SPR

SOCIAL POLICY RESEARCH ASSOCIATES

Partnering for Quality under the Workforce Investment Act:
A Tool Kit for One-Stop System Building

Module 2

Partnering and Organizational Change

Participant Workbook

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SPR SOCIAL POLICY RESEARCH ASSOCIATES

Partnering for Quality Under the Workforce Investment Act:

A TOOL KIT FOR
ONE-STOP SYSTEM BUILDING

Module 2
PARTNERING AND ORGANIZATIONAL CHANGE

Workshop Objectives

- Launch your transition team.
- Equip the team with teamwork tools.
- Equip the team with decision making techniques.
- Discuss what One-Stop partners need to know about each other and why.
- Share information about key features of partner agencies and programs.

2-2

Workshop Objectives
Continued

- Develop a clear understanding of the services and service-related terminology used by different partners.
- Establish procedures for documenting and sharing information on an ongoing basis.
- Build familiarity and trust among partners.
- Review One-Stop Center management structures.

2-3

What is a Team?

"Two or more draft animals harnessed to the same vehicle or implement"

Forming Transition Team

Establishing Team Parameters

- Provided by the group granting the authority to the team.
- Done through a team "charter."

2-5

Forming Transition Team

Using Team Charters

Parameters Specified by Charterers

- Team topic title.
- Objective.
- Expectations (outcomes of deliverables).
- Guidelines to achieve expectations.
- Boundaries of authority.
- Resources available to accomplish tasks.
- Skills required (members, leader, facilitator).

2-6

Forming Transition Team

Using Charters

Parameters Specified by Team

- Meeting time and place.
- Ground rules.
- Operating procedures.
- Next steps.
- Additional resources needed.

2-7

Effective Teamwork

- Influences on effective teamwork include:
  - Environmental influences.
  - Team goals.
  - Defined roles of leaders and team members.
  - Team procedures.
  - Relationships among team members.

2-8

Effective Teamwork

Team Procedures - Well Functioning Team

- Decisions made by consensus.
- Efficient/task-oriented meetings.
- Emphasis on solving problems vs. fixing blame.
- Members participate in discussions/ meetings.
- Meeting minutes promptly distributed.
- Members listen well.
- Frequent feedback to individuals.
- Members are kept informed.
- Deadlines clearly established and agreed upon by the team.

2-9

Effective Teamwork

Team Procedures - Poorly Functioning Team

- Decisions made by crisis.
- Decision-making dominated by one person.
- One way, top-down communications channeled through the leader.
- Minor points debated endlessly.
- Unproductive meetings with unresolved issues.
- Trivial versus significant issues covered in meetings.
- Actions taken without planning.
- Members work individually/ignore each other.
- Members are late for/absent from meetings.

2-10

Developing Teams

4 Stages of Team Development

2-11

Stages of Team Development

As defined by B. W. Tuckman

MATURATION.
Performing.

ORGANIZATION.
Norming.

CONFLICT.
Storming.

ORIENTATION.
Forming.

2-12

Stages of Team Development

Orientation (Forming)

- Attempts to get acquainted and "break the ice"
- Uncertainty among members - especially about goals, power, and relationships
- Group is ready to accept any form of leadership

2-13

Orientation (Forming)

Establishing the Team

1. Get Acquainted
   Meet everyone on the team. Share appropriate histories
2. Establish Purpose
   Clarify the mission/purpose of the team and its task.
   Clarify the lines of authority - to whom does the team report?
   Clarify the amount of decision-making authority the team has been given.
   Allow time for discussion and buy-in to the task.
3. Planning
   Establish ground rules and operating procedures.
   Decide meeting times and places.
   Make arrangements for materials, supplies.
   Decide how other records will be kept.

2-14

Orientation (Forming)

Establishing the Team, continued

4. Clarify Roles
   Choose Team Leader and Facilitator.
   Clarify the role and function of the Leader and Facilitator.
   Decide how other duties will be assigned.
5. Identify Resources
   Identify teamwork skill represented among team members.
   Identify content expertise relating to the project.
   Identify important internal/external connections and contacts which may be helpful during the project.
   Assess team make-up: different work styles, personality types, strengths, diversity.

Developed by L. Yount

2-15

Orientation (Forming)

Establishing the Team, continued

Sample Ground Rules

- Only one person speaks at a time
- Agree on what important words mean
- Keep team business inside the team
- Everyone participates
- No zingers, put-downs, or cheap shots about others ideas
- Open disagreement is okay
- Listening is important

2-16

Orientation (Forming)

Establishing the Team, continued

Sample Ground Rules

- Respect one another, respect the team
- It's okay to enjoy the process
- Celebrate achievements
- Share all relevant information
- Every idea is grist for the mill
- Maintain confidentiality
- Keep agreements

2-17

Orientation (Forming)

Establishing the Team, continued

Sample Operating Procedures

- Arrive on time for meetings
- Attend all meetings
- No smoking in meeting room
- Take regular breaks
- Clarify roles at each meeting - rotate chairing, recording, time keeping
- Come prepared to meetings
- Make decisions by consensus

2-18

Orientation (Forming)

Establishing the Team, continued

- Working with your table, decide on your team's
  - operating procedures.
  - ground rules.
  - team name.
- Decorate a nameplate for your table.

2-19

Stages of Team Development

Conflict (Storming)

- Leader's philosophy, goals, strategies become clear.
- Subgroups struggle for control and power and new philosophy, goals, strategies.
- Facilitator required to help members through conflict and disharmony.
- Redistribution of power helps lead team out of this stage - but some never get beyond this stage because of jealousy and infighting.

2-20

Stages of Team Development

Organization (Norming)

- Power shifts of storming stage are complete.
- Leadership is in touch with the members' ideas, structure and procedures.
- "We" feeling begins to develop.
- New conflicts are *quickly* resolved.

2-21

Stages of Team Development

Maturation (Performing)

- "Give and Take" atmosphere realized.
- Realistic member expectations.
- Subgroups are not disruptive.
- Authority issues are resolved and accepted.

2-22

Stages of Team Development

Team Stage Identification

- Choose one "team" within your One Stop Center or among your teams working on One Stop System Building.
- Identify the current stage (forming, storming, norming or performing) of that team.
- List the identifying characteristics of the team that relate to that stage.
- Share with a partner.

2-23

Team Member Roles

- Attend meetings regularly.
- Adhere to problem-solving tools and techniques.
- Follow through on team recommendations.
- Communicate with non-members.
- Promote cooperation and mutual support.

2-24

Team Member Roles -
Leader

- Team "Pilot"
- Encourage the team to maintain its focus on the *content* under study
- Guide the agenda towards completing the *content* under study
- Provide support
- Keep non-members informed
- Keep team members informed
- Cooperate with the facilitator
- Promote the idea of "teamwork"
- Establish a proper climate

2-25

Team Member Roles -
Facilitator

- Team "Navigator"
- Coaches leader in meeting preparation and on how to conduct the meetings
- Process observer
- Keeps team focused on *process* of the meeting
- Acts a team resource on process tools and techniques
- Intervenes to:
  - ensure even participation
  - keep meeting on track
  - resolve conflicts
  - confront members
  - train members
  - prompt high performance
  - eliminate leader domination
  - eliminate member apathy
  - resolve obstacles

2-26

Team Member Roles
Other Team Members

- Clarifier: Interprets ideas or suggestions; defines terms; clarifies issues before the team; clears up confusion
- Compromiser: Offers compromises that yield status when his or her ideas are involved in conflicts; modifies in the interest of team cohesion or growth
- Consensus Taker: Asks to see whether the team is nearing a decision; "sends up trial balloons" to test possible solutions

From *Process Politics: A Guide for Group Leaders*, by Eileen Guthrie and Warren Sam Miller, 1981, San Diego, CA: University Associates

2-27

Team Member Roles

Other Team Members (continued)

- Encourager: Is friendly, warm and responsive to others; indicates by facial expression or remarks the acceptance of others' contributions.
- Follower: Goes along with the movement of the team: passively accepts the ideas of others; serves as an audience in team discussion and decision making.
- Gatekeeper: Helps to keep communication channels open; facilitates the participation of others; suggests procedures that permit sharing remarks.
- Harmonizer: Attempts to reconcile disagreements: reduces tension; gets people to explore differences.

2-28

Team Member Roles

Other Team Members (continued)

- Information Seeker: Asks for factual clarification; requests facts pertinent to the discussion.
- Informer: Offers facts; gives expression of feelings; gives opinions.
- Initiator: Proposes tasks, goals or actions; defines team problems; suggests procedures.
- Opinion Seeker: Asks for clarification of the values pertinent to the topic under discussion; questions values involved in the alternative suggestions.

2-29

Team Member Roles

Other Team Members (continued)

- Orienter: Defines the position of the team with respect to its goals; points to departures from agreed upon directions or goals; raises questions about the directions pursued in team discussions.
- Reality Tester: Makes critical analysis of ideas; tests ideas against data to see if the ideas would work.
- Standard Setter: Expresses standards for the team to attempt to achieve; applies standards in evaluating the quality of team processes.
- Summarizer: Pulls together related ideas; restates suggestions; offers decisions or conclusions for the team to consider.

2-30

Team Member Roles

Team Role Identification

- *Think back to previous exercise ("Establishing the team").*
- *As a Center team, beside each team role, list the name(s) of the team members who played that role.*
- *If no one played that role, leave it blank and go on to the next team role to be identified.*
- *Report out.*

2-31

Team Member Roles

Team Role Identification
Continued

- Leader
- Facilitator
- Clarifier
- Compromiser
- Consensus taker
- Encourager
- Follower
- Gatekeeper
- Harmonizer
- Information Seeker
- Informer
- Initiator
- Opinion Seeker
- Orienter
- Reality Tester
- Standard Setter
- Summarizer

2-32

Team Role Identification

Debriefing

- Were all roles performed?
- Did one member fulfill multiple roles while others did not perform any?
- Are some roles performed by multiple members while others are not performed?
- How can knowing about the various roles help move your own teams through the stages?

2-33

Decision Making Step by Step

- Diagnose problem.
- Collect data.
- Identify alternatives.
- Analyze critically and compare alternatives.
- Select recommended alternative
- Implement alternative.

From "Balancing Power and Accountability", McKinney, Howard

2-34

Team Decision Making

- Advantages
  - More complete information.
  - More alternatives.
  - Greater potential buy-in among participants.
  - Enhanced legitimacy.
- Disadvantages
  - Consumes more time.
  - May create pressure to conform.
  - Provides more ambiguous responsibilities.

From "Balancing Power and Accountability", McKinney, Howard

2-35

Decision Making Techniques

- Standard Procedure
- Brainstorming
- Ideal Solution Form
- Programmed Evaluation Review Technique (PERT)
- Nominal group technique
- Consensus Model

2-36

Decision Making Techniques

Standard Procedure

- What is the nature of the problem/ issue?
- What are its causes and consequences?
- What are characteristics of solution?
- What are our alternatives?
- Which alternative is the best?
- How do we evaluate our solution?

2-37

Decision Making Techniques

Brainstorming

- Define problem/ challenge
- Identify recorder
- Review ground rules
  - No criticism, no editing.
  - Even unlikely ideas are welcome.
  - The greater the number of ideas, the better.
  - Recording continues until no more ideas are forthcoming.
- Ideas are prioritized.

2-38

Decision Making Techniques

Types of Brainstorming

- Freewheeling.
  - Ideas are shouted out.
  - Make sure everyone has had an opportunity to participate.
  - Make a “last call” for ideas before finishing.
- Round robin.
  - Everyone takes a turn offering an idea.
  - Anyone can pass on any turn.
  - Continue until there are no more ideas.
  - All ideas are listed as they are provided.

2-39

Decision Making Techniques

Ideal Solution Form

- Do we agree on the nature of the problem?
- What would be an ideal solution?
- What conditions can be changed?
- Of available solutions, which is the closest to the ideal?

2-40

Decision Making Techniques

Nominal Group Technique

- Meeting leader explains nature of problem.
- Each person writes down ideas, options, solutions privately.
- Results are presented to the group by each person and recorded on flip chart.
- Anyone may ask for clarification

2-41

Decision Making Techniques

Nominal Group Technique Continued

- Each person ranks the proposed solutions privately. Results are tallied.
- Discussion of preliminary result is conducted.
- Final vote is taken.

2-42

Decision Making Techniques
Consensus

- Consensus replaces traditional voting.
- Traditional voting creates the unfortunate possibility for a some "winning" and some "losing" result.
- In consensus decisions:
  - Present alternative up for vote.
  - Call for a show of "thumbs".

2-43

Decision Making Techniques
Consensus
Continued

- Thumb up = individual agrees with decision and can support it.
- Thumb sideways = individual still has some questions or concerns about the decision but can live with it if necessary.
- Thumb down = individual does not agree with decision and cannot support it.

2-44

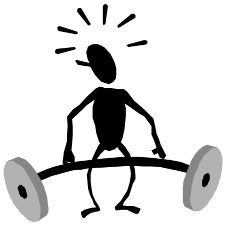
Decision Making Techniques
Consensus
Continued

- Every individual who has a thumb down or a thumb sideways must state their concern, question, or reason for not supporting the decision.
- Supporters have an opportunity to try to address the comments.
- Once everyone has exhausted their concerns and supporters have addressed them, another call for "thumb" support is taken.
- Consensus is reached if all thumbs are up or sideways.

2-45

Activity. . .
Team Decision Making at a One-Stop Center

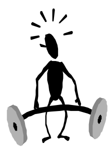
- *In a team resolve a specific One-Stop center management issue/ conflict using group decision making techniques.*



2-46

Activity. . .
Team Decision Making at a One-Stop Center

- *Form team.*
- *Select your issue/ conflict. (3 Min)*
- *Select your decision making technique. (3 Min)*
- *Follow the decision making process. (15 Min)*
- *Render a decision.*
- *Review your process as a team. (5 Min)*
- *Report out.*



2-47

Partnering Introductory Activity

What would it be like to work in a system where you didn't know anything about other agencies and programs?
How effective would you be in assisting customers?

- You know the requirements of your program and the services you can (and can't) provide.
- You don't know anything about the rest of the service system that customers have to navigate.

2-48

Introductory Activity

Instructions for Activity

- Six volunteers "role play" customers (following assigned profiles). Refer to Activity Worksheet 2-A.
- Others divide into groups representing 6 agencies: Job Service, Community College operating "Non-Traditional Jobs for Women" program, TANF agency, local Job Corps center, local GED program, community Food Bank.

2-49

Introductory Activity

Instructions for Activity
Continued

- Individuals representing 6 agencies move to different parts of the room and each make a sign for their agency.
- 6 "customers" travel among agencies trying to get needs met. (15 minutes)
- "Customers" describe what the experience was like.

2-50

What Partners Need to Know About Each Other

Start with "the basics:"

- Agency/program goals and objectives.
- Client targeting and eligibility guidelines.
- The services and products offered by the agency/program.
- How the agency does business.

2-51

What Partners Need to Know

"NOT"

Unless staff have formal cross-staffing arrangements, partners generally do NOT need to know all of the following:

- Detailed program regulations and guidelines for all aspects of a program.
- A complete history of the agency and how its services have changed over time.
- What holiday and vacation policies apply to staff in different positions.

2-52

What Partners Need to Know

As They Work Together

As partners work together, the amount they learn about each other increases.

- Details about how customers qualify for and enter partners' programs.
- How partner agencies define a successful outcome.
- What types of customers a particular program or agency is particularly well equipped to help.

2-53

What Partners Need to Know

As They Work Together

Continued

Over time, partners start converting "program knowledge" to "system knowledge."

- Develop a "system" rather than a "program" perspective.
- Think about ways to improve the system as a whole.
- Suggest ways to build on the particular strengths of different partners.

2-54

What Partners Need to Know

About Agency/Program Goals and Objectives

- Examples of relevant topics:
  - What outcomes is the agency/program interested in furthering?
  - What types of customers is the agency/program required or encouraged to serve?
  - How specific are the program's mandates?
  - What specific goals or objectives does the agency/program have? How are these measured? Over what period of time?

2-55

What Partners Need to Know

About Agency/Program Goals and Objectives

- Why is this information relevant?
  - Understand how goals and objectives shape partners' services and the way they do business.
  - Identify shared goals and objectives.
  - Consider goals and objectives that are not shared.

2-56

What Partners Need to Know

About Customer Eligibility and Targeting

- Examples of relevant topics:
  - What are the eligibility requirements for qualifying for services from the agency/program?
  - What additional selection criteria must be met before customers are selected to receive services?
  - What is the balance between the demand for services and the available funding or service capacity of the program? Wait lists?

2-57

What Partners Need to Know

About Customer Eligibility and Targeting

- Why is this information relevant?
  - Understand how agency determines who is an appropriate or high priority customer.
  - Identify shared customers.
  - Identify distinctions between customer target groups.

2-58

What Partners Need to Know

About Services and Products

- Examples of relevant topics:
  - What different services does the program offer?
  - What are the different levels of service that customers may qualify for? How are customers assigned to specific services?
  - What is the content, intensity, duration of specific services?
  - What are the qualifications of staff providing different services?

2-59

What Partners Need to Know

About Services and Products

- Why is this information relevant?
  - Understand what services different partners provide and how comprehensive their service menus are.
  - Understand how partners differ in the types of services they offer and in the content, intensity, and duration of specific services.
  - Identify service categories for which partners appear to offer similar, overlapping, or related services.

2-60

What Partners Need to Know

About How an Agency Does Business

- Examples of relevant topics:
  - What are funding sources and funding levels?
  - At what level (e.g., federal, state, local) are different program policy decisions made?
  - What are the geographic service areas and regional/local service delivery sites?
  - What are the service delivery staff positions and job descriptions? How are staff trained and supervised?

2-61

What Partners Need to Know

About How an Agency Does Business

- Why is this information relevant?
  - Business practices influence how well services meet customer needs.
  - Business practices also define agency “cultures” and shape staff comfort levels.
  - Resolving differences in how agencies do business is perhaps the most difficult challenge to address.

2-62

Case Study Examples: How Local Partnerships Share Information

- Example #1. Renton Career Development Center in King County, Washington has developed a “CDC Passport” as an activity to help all staff obtain detailed knowledge about key areas of the center and partners’ programs.

2-63

Case Study Examples
How Local Partnerships Share Information
Continued

- Example #2. Brevard County, Florida is developing an "Ambassador Program" to encourage job-shadowing across staff from different programs.
- Example #3. The Baltimore One-Stop Network designated one local staff member from each program as a key contact for information about how that program worked.

2-64

Group Activity: Research Partners' Programs

- Choose a program to research other than one you work for now or have worked for in the past.
- Develop a list of topics you want to research about that program. Use Activity Worksheet 2-B to list questions and record answers.
- Work with other researchers to organize and prioritize your questions.

2-65

Group Activity
Research Partners' Programs
Continued

- Interview the designated program manager or expert respondent about the program.
- Ask follow-up questions to make sure you understand the aspect of the program that you were asking about.
- Report back what you learned about the program and why you think this information is relevant to other One-Stop partners.

2-66

Review Similarities and Differences

Using the information obtained by researching partners' programs, review the similarities and differences between and among partners':

- Goals and objectives.
- Customer eligibility and targeting
- Services and products.
- Ways of doing business.

Use Activity Worksheet 2-C.

2-67

Review Similarities and Differences

Continued

How might these similarities and differences make it easier or harder for partners to collaborate in creating an interdependent service system?

2-68

Compile and Compare Information About Local Services

- It is inevitable that different programs or agencies call different things by the same name and/or use different names for similar things.
- To prepare to build an interdependent system, partners must:
  - Develop a common language.
  - Map available services using the common language.

2-69

Steps in Compiling and Comparing Information about Partner Services

- Step 1. Prepare a glossary of service terms for each program/partner.
- Step 2. Prepare a “cross-walk” of terms to translate between and among programs.
- Step 3. Agree on a shared service terminology.
- Step 4. Map partner services using shared terminology.

2-70

Compile and Compare Service Information

Step 1. Develop A Service Glossary for Each Program

Include the following:

- Service elements or components, with a description of each service.
- How units of service are defined.
- Processes associated with entering and leaving services/program (e.g., intake, enrollment/registration, completion, termination).

2-71

Compile and Compare Service Information

Step 1. Develop A Service Glossary for Each Program

Include (continued):

- Outcomes measured for customers using/completing a service or completing/leaving the program.

Use Activity Worksheet 2-D.

2-72

Step 1. Develop a Service Glossary

Case Study Example

Provide an example of a service glossary for a specific program.

2-73

Compile and Compare Service Information

Step 2. Develop a Crosswalk of Terms

- Discuss how programs differ in the content and names they give to services related to specific functions.
- Conduct a small group activity to review the names local partners give to services related to a specific function, e.g.,
  - Basic skills instruction.
  - Assessment and career exploration.
  - Job search and job placement.

2-74

Compile and Compare Service Information

Step 2. Develop a Crosswalk of Terms
Continued

- Cluster similar services across partners.
- Display the different service offerings across all partners within each cluster or family of services. Use Activity Worksheet 2-E.
- Show how similar services have different names and how services with similar names differ.

2-75

Step 2. Develop a Cross-Walk of Terms

Case Study Example

Provide an example of a matrix displaying different provider offerings for a selected function or family of services.

2-76

Compile and Compare Service Information

Step 3. Agree on a Shared Service Terminology

- *Discuss the benefits of using a shared terminology.*
- *Identify areas of agreement and areas of disagreement on what terms should be used and how they should be defined. Use Activity Worksheet 2-F.*
- *Report out on progress.*

2-77

Step 3. Agree on a Shared Service Terminology

Case Study Example

Provide a case study example of how a local partnership developed a shared service terminology.

2-78

Workshop Objectives

- Management Definition
- Distinguish governance from management issues.
- Review One-Stop Center management structures.

2-79

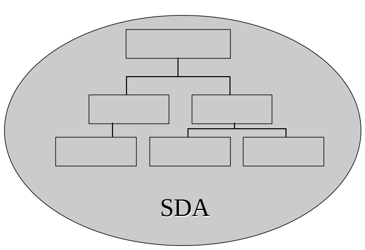
Managing One-Stop Centers

Definitions:

"Judicious use of means to accomplish an end" Dictionary

"Management is the art of getting other people to do all the work."
Anonymous

Management before One-Stop



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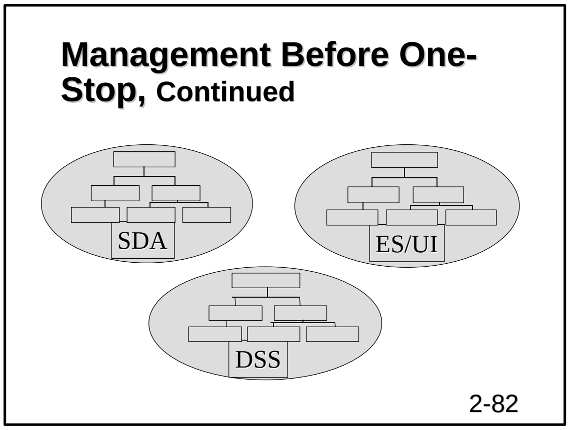
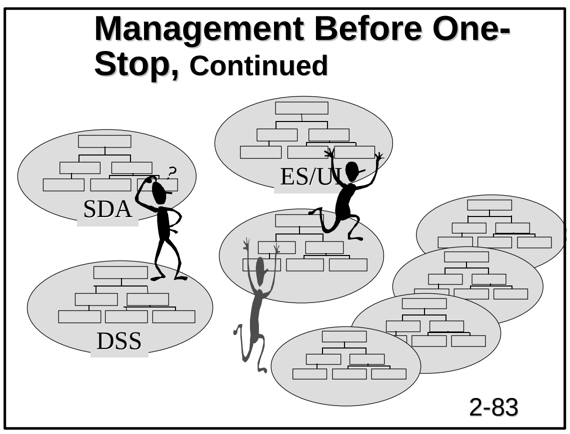

Management Before One-Stop, Continued
SDA
ES/UI
DSS
2-82


Management Before One-Stop, Continued
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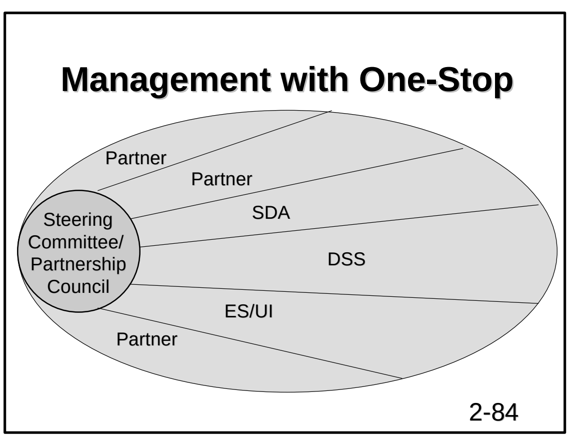
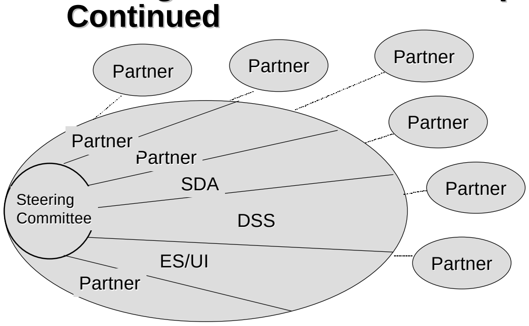

Management with One-Stop
Partner
Partner
SDA
Steering Committee/ Partnership Council
DSS
ES/UI
Partner
2-84

Management with One-Stop Continued



2-85

Management with One-Stop Continued

- Responsibility to coordinate services has shifted from customer to "system".
- Need to know more about partners has increased.
- Partners view each other as team members. Team management is common.
- Need for communication among partners has increased.

2-86

One-Stop Center Management Models.

	Advantages	Disadvantages
Single Manager		
Dual Managers		
Team Management		

2-87

One-Stop Center Management Models.

- Single Manager
  - Louisville, Kentucky
- Dual Managers
  - Bowling Green, Ohio
  - New London, Connecticut
- Team Management
  - Anoka County, Minnesota
  - Des Moines, Iowa

2-88

One-Stop Center Management Models. Louisville, Kentucky

- Health and Social Service One-Stops
- Single site administrators for each site
- Joint supervision of staff when possible
- No disciplinary authority
- Supported by
  - Operations Committee
  - Executive Committee
  - Community Council

One-Stop Center Management Models. Bowling Green, Ohio

- Co-managed
  - Department of Human Services Co-manager
  - JTPA co-manager
- Some specialization
  - DHS manager is Center Workgroup chair.
  - JTPA manager is in charge of facility and hardware management.

One-Stop Center Management Models.
New London, Connecticut

Co-managed

- CTDOL Job Center Director
  - Overall Center Director
  - ES/UI
  - Veterans ES
- Regional Workforce Development Board Program Manager
  - JTPA Programs
  - responsible for Career Services Center

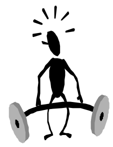
One-Stop Center Management Models.
Anoka County, Minnesota

- Team-managed
  - Steering Committee co-chaired by directors of 4 investor partners (JTPA/ ES/UI/ Rehabilitation Services/ Income Maintenance)
- Supported by
  - Workforce Center Coordination and Planning Group
  - Cross Agency Operations Committee
  - Human Service Advisory Group

One-Stop Center Management Models.
Des Moines, Iowa

- Team-managed
  - "Partners Group" interagency team of core partners.
- Supported by
  - Customer Services Committee
  - Assessment Committee
  - Employer Services Committee
  - Job Development Committee

Activity. . .
One-Stop Center Management Models.
Which one is right for you?



- *In your team discuss advantages and disadvantages of each management structure for your One-Stop center.*
- *Using consensus decision making technique, chose a preferred management structure.*
- *Identify next steps to prepare a recommendation to your policy body*
- *Report out.*

2-94

Homework Assignments

2-95

Assignment 1 (Optional)

- Prepare a written summary or chart of the key features of each of the major programs operated by the partner agencies.
- Ask a representative from each program to review and correct its profile.
- Disseminate this summary to all local service delivery staff.

2-96

Assignment 1
Continued

- Identify authoritative sources of information (individual informants and resource manuals) that can be used to answer future questions or provide additional detail on program features.

2-97

Assignment 2

- Complete a map of customer services and products offered by each of the partner programs.
- This work could be divided among several different committees, each of which will map a different cluster of customer services.

2-98

Assignment 2b (Optional)

- Research and report on variations in how different partners do business.
- Possible topics for research include:
  - How partners provide staff development.
  - Details of personnel policies, wage levels, and staff benefits.
  - Reporting and performance requirements.

2-99

Assignment 3

- Develop a recommendation for a One-Stop center management structure for your policy body.

2-100

Resource Tool Kit

2-101

Tools Used in Module 2

- Brainstorming:
  - Identifying what partners need to know about each other.
  - Generating questions relevant to identified topics.
- Interviewing:
  - Documenting key features of One-Stop partners through question and answer sessions with managers.

2-102

Tools Used in Module 2
Continued

- Identifying authoritative sources of information for reference on an as-needed basis:
  - Written documents.
  - Knowledgeable individuals.
- Using charts and matrices:
  - Documenting comparable information about partners' programs.

2-103

Tools Used in Module 2
Continued

- Developing a glossary of terms used by each program.
- Preparing a "cross-walk" that compares the service offerings and service terms used by each program.
- Consensus building: exploring willingness to use a common language.

2-104

Partnering for Quality under the Workforce Investment Act:

A Tool Kit for One-Stop System Building

Module 2

Partnering and Organizational Change

Trainer Manual

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Trainer Manual Guidelines

This manual provides a step-by-step approach to training on *Partnering and Organizational Change*. This session is the second in a series of five training modules designed to help local workforce development agencies collaborate to improve customer services. The complete curriculum on *Partnering for Quality under WIA* includes:

- Module 1. Reviewing System-Building Progress and Developing a Blueprint for WIA Transition
- Module 2. Partnering and Organizational Change
- Module 3. Collecting and Using Customer Feedback
- Module 4. Designing a System for the Delivery of Integrated Services
- Module 5. Building a Process for Continuous Improvement

Each module has a series of companion products. In addition to this trainer manual, products developed for Module 2 on *Partnering and Organizational Change* include overhead transparencies and a student workbook.

The best place to start with this guide is to read it through once. The guide is designed to be easy to understand. Following are points for reading and using the guide.

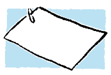
Sentences typed in ***bold italics*** are intended to be said by the trainer to the group.

- Sentences with a bullet in front of them are action items that the trainer needs to do.

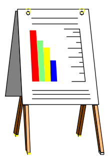
Module 2. Partnering and Organizational Change

Icons on the left-hand side of the guide provide a visual view of the type of activity that is taking place. The Icon Key is provided below.

- Use overhead slide.

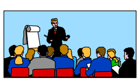


- Have participants complete exercise.



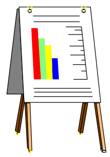
- Write information on flip chart.

- Use small group work/discussion.



- Use full group discussion.

Module 2. Partnering and Organizational Change



- Write "Welcome" and your name and phone number on a flip chart at front of room prior to attendees arriving. Also include your e-mail address if you have one.

WELCOME! I'm glad you could be with us today.

- Introduce yourself and give a brief description of your background and qualifications to lead this training module.

- Put on title overhead for Module 2.

> **SPR** SOCIAL POLICY RESEARCH ASSOCIATES
>
> **Partnering for Quality Under the Workforce Investment Act:**
> **A TOOL KIT FOR ONE-STOP SYSTEM BUILDING**
>
> **Module 2**
> **PARTNERING AND MANAGING CHANGE**

This session will cover the material in your Participant Workbook under Module 2, Partnering and Organizational Change.

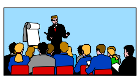
- Put on Overhead 2-2.

Module 2. Partnering and Organizational Change

Workshop Objectives

- Launch your transition team.
- Equip the team with teamwork tools.
- Equip the team with decision making techniques.
- Discuss what One-Stop partners need to know about each other and why.
- Share information about key features of partner agencies and programs.

2-2



- Introduce the workshop objectives by saying:

In this session, we will launch your transition team and equip the team with teamwork and decision making tools. We will then review how One-Stop partners can get to know each other. We will discuss how increased understanding can change strangers and competitors into trusted partners interested in a common objective: building an effective workforce development system that meets customer needs.

- Put on Overhead 2-3

Workshop Objectives
Continued

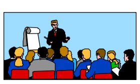
- Develop a clear understanding of the services and service-related terminology used by different partners.
- Establish procedures for documenting and sharing information on an ongoing basis.
- Build familiarity and trust among partners.
- Review One-Stop Center management structures.

2-3

- Review the workshop objectives stated on the overheads.

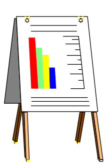
These objectives cannot all be accomplished in a single training session. Building familiarity and trust among partners is a process that takes a number of months to complete.

Expect periods of progress toward increased trust and understanding interspersed with periods of suspicion and frustration. It is not easy to meld different agencies' work cultures together.



- Use full group discussion.

Please introduce yourself and state (1) something you think other agencies don't understand about your agency and the way it does business OR (2) something you don't understand about another agency's policies or procedures.



- Record the responses on two flip charts and hang the completed pages around the room to return to throughout the session.

Module 2. Partnering and Organizational Change

- Put on overhead 2-4.

What is a Team?

"A group of people working together in a coordinated effort."

"Two or more draft animals harnessed to the same vehicle or implement"

2-4

We are starting with a few team tools to help our newly formed (or previously established) transition team in its work. After all, we want team members to feel like they are working towards a coordinated effort. We don't want them to feel like draft animals.

- At this point you may want to gauge the participant's previous exposure to team development training and adjust the presentation accordingly.

- Put on overhead 2-5.

Forming Transition Team

Establishing Team Parameters

- Provided by the group granting the authority to the team.
- Done through a team “charter.”

2-5

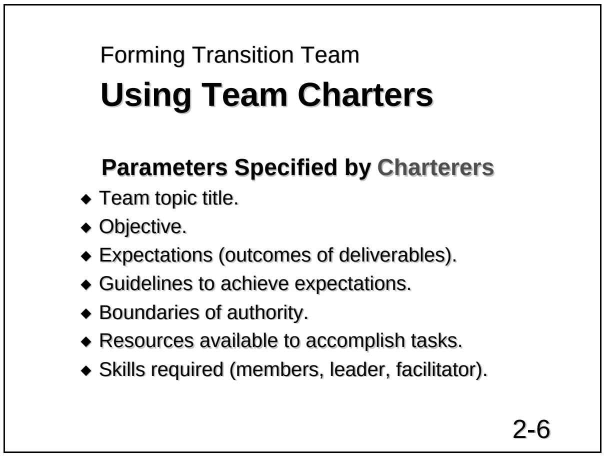
In module 1 we chartered a transition team to participate in this training and to propose and implement actions that are the product of this process.

I would like to take a little bit of time to revisit the chartering process so that we are all in agreement about our role, purpose, and authority before we proceed.

Going through a chartering process for this transition team has several benefits: It establishes clear authority for the team and its members and it helps to define the work of the teams and enables them to begin their work more quickly.

- Put on overhead 2-6.

Module 2. Partnering and Organizational Change



- Review each point on slide 2-6.

- These are the parameters of the transition teams that were specified during module 1. The objectives of the teams were written up in Activity Worksheets 1-D through 1-G. In case they were not specified, you may want to give the group some time to specify them now.

The TEAM TOPIC TITLE should represent the general topic of the work to be done.

The OBJECTIVE of the team should describe in general what the team is expected to accomplish. An example would be: "to develop a process to provide quick, relevant job referrals that meets the needs of employers and job applicants." Team objectives can be found on Activity Worksheets 1-D through 1-G that were completed during module 1.

EXPECTATIONS would include specific deliverables for the team to complete. Examples might include: a basic flow chart of the process, the identification of customer requirements and standards for both job applicants and employers, the identification of methods to streamline the process, new staff orientation of the process, and staff training on any new methods that are tested, implemented, and standardized.

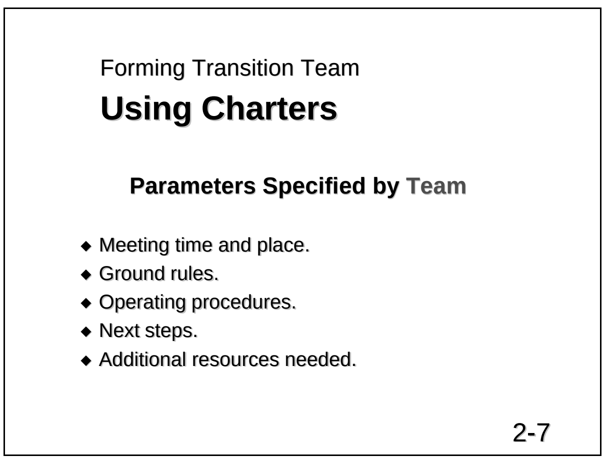
GUIDELINES may include any federal, state, or local laws, regulations, or policies, and benchmark information from outside the organization.

BOUNDARIES of authority express the authority of the team to make decisions, make recommendations, or provide basic input.

RESOURCES AVAILABLE that are specified in a team charter may include human or financial resources, equipment, books/materials or supplies, or time to be specifically applied to the designated task.

SKILLS REQUIRED may include the designation of a person or persons to be the leader or facilitator of the team, assistance of a process owner, or additional training that will be available to the team.

- Put on overhead 2-7.



- Review each point of the overhead.

- Emphasize that these parameters are specified by the team members.

- Put on overhead 2-8.

Developing Teams

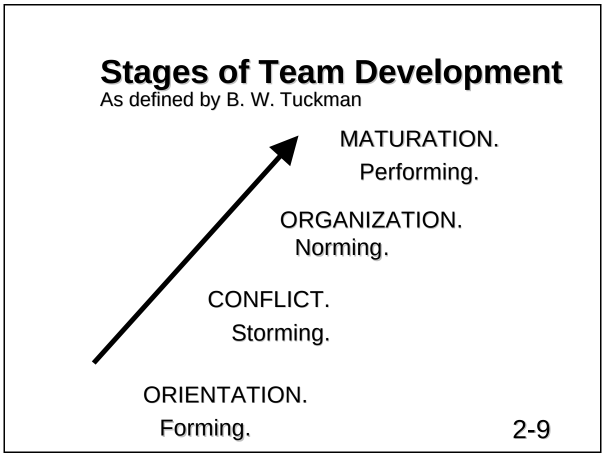
4 Stages of
Team Development

2-8

Teams need to be developed and nurtured. They go through stages in their development process.

We will first learn more about those stages and then we will apply what we learned to the teams we are working with in our One-Stop partnership.

- Put on overhead 2-9.



This may remind you of your own maturation form childhood through adolescence through young adulthood to the mature fully self-actualized human being that you are today.

Teams, according to Tuckman, go through similar stages. Let's take a closer look at each.

- Put on overhead 2-10.

Stages of Team Development

Orientation (Forming)

- Attempts to get acquainted and "break the ice"
- Uncertainty among members - especially about goals, power, and relationships
- Group is ready to accept any form of leadership

2-10

When we all got together, at the beginning of this work shop/ training, we were in this stage. We were a bit uncomfortable

perhaps, unsure of what to expect, of goals, power, and relationship.

This stage is very apparent when you get your partners together and you start talking to them about One-Stop.

- Put on overhead 2-11.

Orientation (Forming)

Establishing the Team

1. Get Acquainted
   Meet everyone on the team. Share appropriate histories
2. Establish Purpose
   Clarify the mission/purpose of the team and its task.
   Clarify the lines of authority - to whom does the team report?
   Clarify the amount of decision-making authority the team has been given.
   Allow time for discussion and buy-in to the task.
3. Planning
   Establish ground rules and operating procedures.
   Decide meeting times and places.
   Make arrangements for materials, supplies.
   Decide how other records will be kept.

2-11

Here are some steps you can go through to help your team through this stage. Helping the team with these steps may save some work later

- Put on overhead 2-12.

Orientation (Forming)

Establishing the Team, continued

4. Clarify Roles
   - Choose Team Leader and Facilitator.
   - Clarify the role and function of the Leader and Facilitator.
   - Decide how other duties will be assigned.

5. Identify Resources
   - Identify teamwork skill represented among team members.
   - Identify content expertise relating to the project.
   - Identify important internal/external connections and contacts which may be helpful during the project.
   - Assess team make-up: different work styles, personality types, strengths, diversity.

Developed by L. Yount

2-12

- Put on overhead 2-13.

Orientation (Forming)

Establishing the Team, continued

Sample Ground Rules

- Only one person speaks at a time
- Agree on what important words mean
- Keep team business inside the team
- Everyone participates
- No zingers, put-downs, or cheap shots about others ideas
- Open disagreement is okay
- Listening is important

2-13

Here is an example of a set of ground rules that you may want to give to your team for consideration. Teams work best if they agree to a set of ground rules that they have developed themselves.

- Put on overhead 2-14.

Module 2. Partnering and Organizational Change

Orientation (Forming)

Establishing the Team,
continued

<u>Sample Ground Rules</u>

- Respect one another, respect the team
- It's okay to enjoy the process
- Celebrate achievements
- Share all relevant information
- Every idea is grist for the mill
- Maintain confidentiality
- Keep agreements

2-14

- Ask for additional ground rules items from the group.

- Put on overhead 2-15.

Orientation (Forming)

Establishing the Team,
continued

<u>Sample Ground Rules</u>

- Respect one another, respect the team
- It's okay to enjoy the process
- Celebrate achievements
- Share all relevant information
- Every idea is grist for the mill
- Maintain confidentiality
- Keep agreements

2-14

These operating procedures help the team stay productive.

- Put on overhead 2-16.

Orientation (Forming)

Establishing the Team, continued

- Working with your table, decide on your team's
  - operating procedures.
  - ground rules.
  - team name.
- Decorate a nameplate for your table.

2-16

Let's establish your team.

- Use small group work/discussion.

How did that work? Did you find that agreement was easily reached? Have you tried this with your One-Stop Teams? Have you had experiences where teams operated without ground rules and operating procedures? How did that work out?

- Put on overhead 2-17.

Stages of Team Development

Conflict (Storming)

- Leader's philosophy, goals, strategies become clear.
- Subgroups struggle for control and power and new philosophy, goals, strategies.
- Facilitator required to help members through conflict and disharmony.
- Redistribution of power helps lead team out of this stage - but some never get beyond this stage because of jealousy and infighting.

2-17

This stage often comes as a disappointment to team leaders and members. You have probably experienced this in your work. After the initial euphoria of having gotten the group together and seeing the seemingly unlimited potential of working together, all of a sudden conflicts emerge. Members strongly disagree with the direction of the team, some members may threaten to pull out, and others are only able to see the barriers to success ahead.

It helps to expect this stage so that you are not frustrated when it occurs.

Difficulties in this stage need not threaten the team or the future of the partnership as a whole. They are usually an expression of the leadership struggle that occurs at this stage and of the fact that different team members have different visions of the goals of the team.

- Ask team members for examples for "Storming" from their experience with teams.

- Put on overhead 2-18.

Stages of Team Development

Organization (Norming)

- Power shifts of storming stage are complete.
- Leadership is in touch with the members' ideas, structure and procedures.
- "We" feeling begins to develop.
- New conflicts are *quickly* resolved.

2-18

At this stage members have a sense of team identity and belonging to that team. Trust and familiarity with each other dominates the proceedings.

- Put on overhead 2-19.

Stages of Team Development

Maturation (Performing)

- ◆ "Give and Take" atmosphere realized.
- ◆ Realistic member expectations.
- ◆ Subgroups are not disruptive.
- ◆ Authority issues are resolved and accepted.

2-19

At the "Performing" stage teams are most effective. Most of the energy of the team can be devoted to the tasks at hand. Little attention is diverted to leadership struggles or attempts to dominate the discussions. Opinions are expressed openly. Compromises are reached. Consensus decisions are made easily.

- Put on overhead 2-20.

Module 2. Partnering and Organizational Change

Stages of Team Development

Team Stage Identification

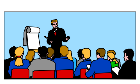
- Choose one “team” within your One Stop Center or among your teams working on One Stop System Building.
- Identify the current stage (forming, storming, norming or performing) of that team.
- List the identifying characteristics of the team that relate to that stage.
- Share with a partner.

2-20

Let’s find out what stage teams are at in your partnership.

- Ask each team to follow the steps on slide 2-20.

- Use small group work/discussion.
- Ask each team to report out to the full group a recap of their team stage findings.



- Use full group discussion.
- Ask for comments and observations about commonalties from team to team.

- Put on overhead 2-21.

Team Member Roles

- Attend meetings regularly.
- Adhere to problem-solving tools and techniques.
- Follow through on team recommendations.
- Communicate with non-members.
- Promote cooperation and mutual support.

2-21

Let's now look at the internal composition of teams more closely. Here are some characteristics of valuable team members.

There are also some specific roles that specific team members play.

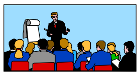
- Put on overhead 2-22.

Team Member Roles -
Leader

- Team "Pilot"
- Encourage the team to maintain its focus on the *content* under study
- Guide the agenda towards completing the *content* under study
- Provide support
- Keep non-members informed
- Keep team members informed
- Cooperate with the facilitator
- Promote the idea of "teamwork"
- Establish a proper climate

2-22

The team leader has these characteristics. Notice what the leader is and also what he/she is not.



- Use full group discussion.

- Ask for comments and observations about team leader characteristics.

- Put on overhead 2-23.

Team Member Roles -

Facilitator

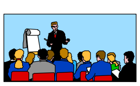
- Team "Navigator"
- Coaches leader in meeting preparation and on how to conduct the meetings
- Process observer
- Keeps team focused on *process* of the meeting
- Acts a team resource on process tools and techniques

- Intervenes to:
  - ensure even participation
  - keep meeting on track
  - resolve conflicts
  - confront members
  - train members
  - prompt high performance
  - eliminate leader domination
  - eliminate member apathy
  - resolve obstacles

2-23

Often leaders and facilitators are seen as one and the same. However, teams tend to be more effective if different individuals play the two roles.

It is important for the facilitator to be seen as a neutral person. This is especially true if turf issues are being discussed and negotiated.



- Use full group discussion.

- Ask for comments and observations about facilitator characteristics.

- Put on overhead 2-24.

Team Member Roles

Other Team Members

- Clarifier: Interprets ideas or suggestions; defines terms; clarifies issues before the team; clears up confusion
- Compromiser: Offers compromises that yield status when his or her ideas are involved in conflicts; modifies in the interest of team cohesion or growth
- Consensus Taker: Asks to see whether the team is nearing a decision; "sends up trial balloons" to test possible solutions

From *Process Politics: A Guide for Group Leaders*, by Eileen Guthrie and Warren Sam Miller, 1981, San Diego, CA: University Associates

2-24

Here are other team member roles that different people take on. Sometimes a member may take on more than one role; sometimes a member may switch roles during a meeting. Usually these roles are not explicitly identified.

- Put on overhead 2-25.

Team Member Roles

Other Team Members (continued)

- Encourager: Is friendly, warm and responsive to others; indicates by facial expression or remarks the acceptance of others' contributions.
- Follower: Goes along with the movement of the team: passively accepts the ideas of others; serves as an audience in team discussion and decision making.
- Gatekeeper: Helps to keep communication channels open; facilitates the participation of others; suggests procedures that permit sharing remarks.
- Harmonizer: Attempts to reconcile disagreements: reduces tension; gets people to explore differences.

2-25

- Put on overhead 2-26.

Team Member Roles

Other Team Members (continued)

- Information Seeker: Asks for factual clarification; requests facts pertinent to the discussion.
- Informer: Offers facts; gives expression of feelings; gives opinions.
- Initiator: Proposes tasks, goals or actions; defines team problems; suggests procedures.
- Opinion Seeker: Asks for clarification of the values pertinent to the topic under discussion; questions values involved in the alternative suggestions.

2-26

- Put on overhead 2-27.

Team Member Roles

Other Team Members (continued)

- Orienter: Defines the position of the team with respect to its goals; points to departures from agreed upon directions or goals; raises questions about the directions pursued in team discussions.
- Reality Tester: Makes critical analysis of ideas; tests ideas against data to see if the ideas would work.
- Standard Setter: Expresses standards for the team to attempt to achieve; applies standards in evaluating the quality of team processes.
- Summarizer: Pulls together related ideas; restates suggestions; offers decisions or conclusions for the team to consider.

2-27

- Put on overhead 2-28.

Team Member Roles

Team Role Identification

- *Think back to previous exercise ("Establishing the team").*
- *As a Center team, beside each team role, list the name(s) of the team members who played that role.*
- *If no one played that role, leave it blank and go on to the next team role to be identified.*
- *Report out.*

2-28

Now we want you to identify the roles played by each of you in your team activity.

- Ask each team to follow the steps on slide 2-28.

- Use small group work/discussion.

- Put on overhead 2-29.

Team Member Roles

Team Role Identification
Continued

- Leader
- Facilitator
- Clarifier
- Compromiser
- Consensus taker
- Encourager
- Follower
- Gatekeeper
- Harmonizer
- Information Seeker
- Informer
- Initiator
- Opinion Seeker
- Orienter
- Reality Tester
- Standard Setter
- Summarizer

2-29

- Put on overhead 2-30.

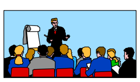
Team Role Identification

Debriefing

- Were all roles performed?
- Did one member fulfill multiple roles while others did not perform any?
- Are some roles performed by multiple members while others are not performed?
- How can knowing about the various roles help move your own teams through the stages?

2-30

- Ask each team to report out to the full group a recap of their findings regarding team roles.



- Use full group discussion.

- Ask for comments and observations about commonalties from team to team.

- Put on overhead 2-31.

**Decision Making
Step by Step**

- Diagnose problem.
- Collect data.
- Identify alternatives.
- Analyze critically and compare alternatives.
- Select recommended alternative
- Implement alternative.

From “Balancing Power and Accountability”, McKinney, Howard

2-31

In order to move teams forward decisions have to be made. If teams only get together to exchange ideas and never make any decisions, then the agenda of the partnership cannot advance.

Teams need to be able to make decisions, even if they are not the final decision-makers. In order for a team to present alternatives to a final decision-maker, it needs to be able to select those alternatives from a larger pool of possible solutions.

In order to make decisions teams have to be given authority over a specific area or topic.

Teams also need to have a mechanism in place that allows them to make decisions effectively.

First let’s look at the anatomy of a decision from diagnosis to implementation of a solution.

- Put on overhead 2-32.

Team Decision Making

- Advantages
  - More complete information.
  - More alternatives.
  - Greater potential buy-in among participants.
  - Enhanced legitimacy.
- Disadvantages
  - Consumes more time.
  - May create pressure to conform.
  - Provides more ambiguous responsibilities.

From "Balancing Power and Accountability", McKinney, Howard 2-32

When teams are asked to make decisions, the dynamics are a bit more complex. There are advantages to team decision making and there are disadvantages.

For the purpose of One-Stop, we have decided that there are intrinsic reasons to have teams make decisions. This is the basis of collaboration. Without team decision making a partnership cannot survive.

- Put on overhead 2-33.

Decision Making Techniques

- Standard Procedure
- Brainstorming
- Ideal Solution Form
- Programmed Evaluation Review Technique (PERT)
- Nominal group technique
- Consensus Model

2-33

Let's look at some alternative decision making models so we can use them when appropriate. Note that these techniques can sometimes be combined with each other for best results.

- Put on overhead 2-34.

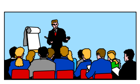
Decision Making Techniques

Standard Procedure

- What is the nature of the problem/ issue?
- What are its causes and consequences?
- What are characteristics of solution?
- What are our alternatives?
- Which alternative is the best?
- How do we evaluate our solution?

2-34

- Ask for experiences with this technique. When is it appropriate?



- Use full group discussion.

- Put on overhead 2-35.

Module 2. Partnering and Organizational Change

Decision Making Techniques

Brainstorming

- Define problem/ challenge
- Identify recorder
- Review ground rules
  - No criticism, no editing.
  - Even unlikely ideas are welcome.
  - The greater the number of ideas, the better.
  - Recording continues until no more ideas are forthcoming.
- Ideas are prioritized.

2-35

Here is a very common technique to help with the decision making process. It is primarily intended to generate a lot of ideas and alternatives. On its own it does not result in decisions.

For prioritizing consider the multi voting techniques. You give each team member a pre-determined number of votes. If you have ten alternatives, you may give every member 5 votes. Members can then allocated their votes however they chose, giving several votes to one item or spreading them among many different alternatives.

Ideas are then prioritized according to the number of votes they received.

- Put on overhead 2-36.

Decision Making Techniques

Types of Brainstorming

- Freewheeling.
  - Ideas are shouted out.
  - Make sure everyone has had an opportunity to participate.
  - Make a “last call” for ideas before finishing.
- Round robin.
  - Everyone takes a turn offering an idea.
  - Anyone can pass on any turn.
  - Continue until there are no more ideas.
  - All ideas are listed as they are provided.

2-36

There are different ways to brainstorm. The round robin technique is particularly useful if you have team members who rarely participate and others who dominate the proceedings. It guarantees everyone equal access to participate.

- Put on overhead 2-37.

Decision Making Techniques

Ideal Solution Form

- Do we agree on the nature of the problem?
- What would be an ideal solution?
- What conditions can be changed?
- Of available solutions, which is the closest to the ideal?

2-37

The Ideal Solution Form is then useful when you know (for example if customers have told you) what the ideal solution should be. This technique allows you to focus on finding a solution that comes the closest to the ideal.

- Put on overhead 2-38.

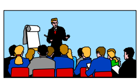
Decision Making Techniques

Nominal Group Technique

- Meeting leader explains nature of problem.
- Each person writes down ideas, options, solutions privately.
- Results are presented to the group by each person and recorded on flip chart.
- Anyone may ask for clarification

2-38

- Ask for experiences with this technique. When is it appropriate?



- Use full group discussion.

- Put on overhead 2-39.

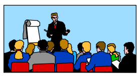
Decision Making Techniques

Nominal Group Technique Continued

- Each person ranks the proposed solutions privately. Results are tallied.
- Discussion of preliminary result is conducted.
- Final vote is taken.

2-39

- Ask for experiences with this technique. When is it appropriate?



- Use full group discussion.

- Put on overhead 2-40.

Decision Making Techniques
Consensus

- Consensus replaces traditional voting.
- Traditional voting creates the unfortunate possibility for a some "winning" and some "losing" result.
- In consensus decisions:
  - Present alternative up for vote.
  - Call for a show of "thumbs".

2-40

Many of the methods presented so far depend on some form of majority voting at the end to determine the chosen alternative.

However, many partnerships have realized that majority rule does not always produce the best results and that sometimes, consensus decision making is the preferred method. Consensus decision making can be used for any of the models previously presented.

- Put on overhead 2-41.

Decision Making Techniques
Consensus
Continued

- <u>Thumb up</u> = individual agrees with decision and can support it.
- <u>Thumb sideways</u> = individual still has some questions or concerns about the decision but can live with it if necessary.
- <u>Thumb down</u> = individual does not agree with decision and cannot support it.

2-41

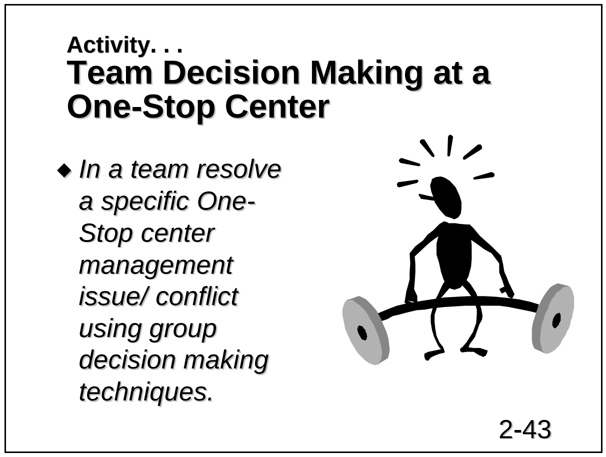
- Put on overhead 2-42.

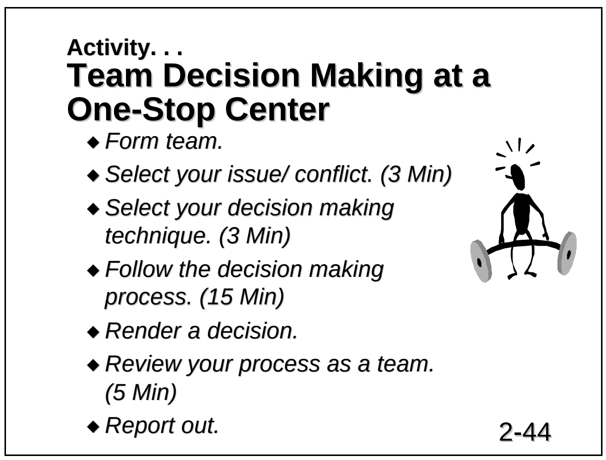
Decision Making Techniques
Consensus
Continued

- Every individual who has a thumb down or a thumb sideways must state their concern, question, or reason for not supporting the decision.
- Supporters have an opportunity to try to address the comments.
- Once everyone has exhausted their concerns and supporters have addressed them, another call for "thumb" support is taken.
- Consensus is reached if all thumbs are up or sideways.

2-42

- Put on overhead 2-43 and 2-44.





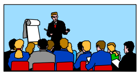
In your team we would now like for you to solve a One-Stop issue. Every team gets to select an issue that is currently before them.

- Use small group work/discussion.

- If there are teams who need ideas of typical One-Stop problems/ conflicts suggest these:
  - Center opening hours
  - Staffing of lobby
  - Staffing of center telephone switchboard

- Indicate to the teams how much time they have to render a decision. (10-20 Minutes depending on time available)

Module 2. Partnering and Organizational Change



- Use full group discussion.

- Ask each team to report out to the full group a recap of their decision and how they arrived at it.

- Once every team has reported out, explain that we are now ready to focus on getting to know our partners better.

- This may be a good time for a break.

- Put on overhead 2-45.

The purpose of the next activity is to find out how important it is to know about your partners' programs and services in order to help your customers meet their needs.

Partnering
Introductory Activity

What would it be like to work in a system where you didn't know anything about other agencies and programs?

How effective would you be in assisting customers?

- You know the requirements of your program and the services you can (and can't) provide.
- You don't know anything about the rest of the service system that customers have to navigate.

2-45

- Ask for six volunteers to pretend to be customers in the activity.

We will provide you with a profile of who you are and what your situation is. You are free to adapt your profile as you like. During this exercise your job is to notice how the programs you

approach for assistance respond to your needs and how satisfied you are with the services you are offered.

- Explain to rest of attendees that they will be assigned to one of six agencies. Have them count off from 1 to 6.

"1's" are staff at a local Job Service office.

"2's" work at a community college program that encourages women to find out about and prepare for "non-traditional careers."

"3's" are case workers in a local TANF agency. They are responsible for making sure TANF recipients find jobs.

"4's" are recruiters for the nearby Job Corps center.

"5's" operate a local GED program open to the general public.

"6's" operate a community food bank.

- Explain to the agency representatives that:

Your job is to find out whether the customer is appropriate for the services you offer. Try to be helpful and courteous, but remember that you don't know anything about other service providers in the community.

- Put on Overhead 2-46 and 2-47.

Module 2. Partnering and Organizational Change

Partnering Introductory Activity

Instructions for Activity

- Six volunteers "role play" customers (following assigned profiles). Refer to Activity Worksheet 2-A.
- Others divide into groups representing 6 agencies: Job Service, Community College operating "Non-Traditional Jobs for Women" program, TANF agency, local Job Corps center, local GED program, community Food Bank.

2-46

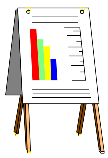
Partnering Introductory Activity

Instructions for Activity
Continued

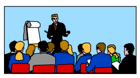
- Individuals representing 6 agencies move to different parts of the room and each make a sign for their agency.
- 6 "customers" travel among agencies trying to get needs met. (15 minutes)
- "Customers" describe what the experience was like.

2-47

- Instruct individuals representing the six agencies to move to different parts of the room and make a sign for their agency/program.
- Tell the group that for fifteen minutes the six customers will be traveling to different programs trying to get their needs met.
- Set the timer for 15 minutes.
- At the end of fifteen minutes have the groups reconvene. Ask the six customers to describe what their experience was like and whether they got their needs met.



- Note key findings on the flip chart.



- Facilitate group discussion on the activity they just completed.

Even with good intentions, if program staff do not know what other services are available in the community and how to access them, they cannot do a good job of helping customers meet their needs.

At worst, they find themselves: (1) trying to convince eligible customers to select the services they have to offer; or (2) trying to get customers who are ineligible for their services to go away.

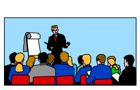
- Display Overhead 2-48.

What Partners Need to Know About Each Other

Start with "the basics:"

- ◆ Agency/program goals and objectives.
- ◆ Client targeting and eligibility guidelines.
- ◆ The services and products offered by the agency/program.
- ◆ How the agency does business.

2-48



- Review the points on the overhead.

Module 2. Partnering and Organizational Change

These are just a starting point, but they are an essential starting point.

Misunderstandings between agencies also arise out of differences in agency culture and values, history and tradition. that it is hard to teach or to learn. Try to identify differences in traditions and values as well as the official program goals, objectives, services, and business practices.

- Display Overhead 2-49.

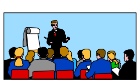
What Partners Need to Know

"NOT"

Unless staff have formal cross-staffing arrangements, partners generally do NOT need to know all of the following:

- Detailed program regulations and guidelines for all aspects of a program.
- A complete history of the agency and how its services have changed over time.
- What holiday and vacation policies apply to staff in different positions.

2-49



- Review the points on the overheads.

Although you can't possibly become an expert in another program overnight, you will need to understand far more of the details of how other programs work than in the past.

You will also need to know how to find out accurate answers to questions about other programs on an as-needed basis.

- Display Overheads 2-50 and 2-51.

What Partners Need to Know

As They Work Together

As partners work together, the amount they learn about each other increases.

- Details about how customers qualify for and enter partners' programs.
- How partner agencies define a successful outcome.
- What types of customers a particular program or agency is particularly well equipped to help.

2-50

What Partners Need to Know

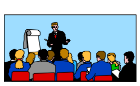
As They Work Together

Continued

Over time, partners start converting "program knowledge" to "system knowledge."

- Develop a "system" rather than a "program" perspective.
- Think about ways to improve the system as a whole.
- Suggest ways to build on the particular strengths of different partners.

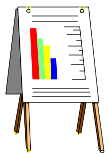
2-51



- Review the points on these two overheads.

- Ask attendees for some examples of what it would mean to develop a "system perspective. " Talk about how focusing on customer needs and desires is often a key to shifting from a program to a system perspective.

Module 2. Partnering and Organizational Change



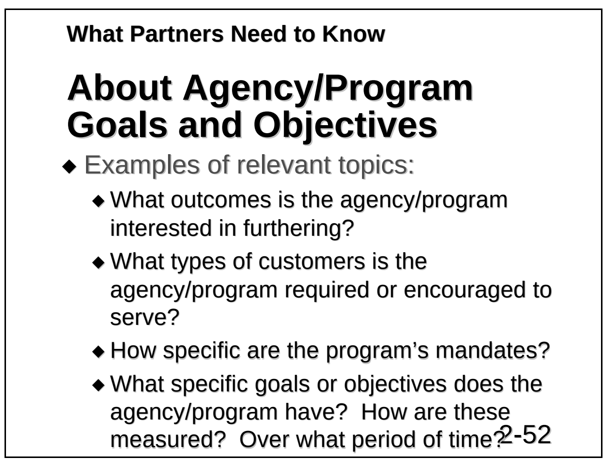
- Uncover a flip chart page labeled "GOALS AND OBJECTIVES." Ask:

What are some of the things that One-Stop partners should know about each others' goals and objectives?

Why is this information relevant for One-Stop partners to know about each other?

- Record ideas on the flip chart. Ask for five or six volunteers to give ideas.

- Display Overheads 2-52 and 2-53.

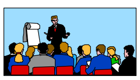


What Partners Need to Know

About Agency/Program Goals and Objectives

- Why is this information relevant?
  - Understand how goals and objectives shape partners' services and the way they do business.
  - Identify shared goals and objectives.
  - Consider goals and objectives that are not shared.

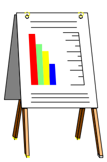
2-53



- Compare the ideas on the flip chart to the "examples of relevant topics" and ideas about why this information is relevant listed on the overheads.

There are a number of different "right" answers to these questions.

Partners rarely have goals and objectives that are exactly the same. How they choose to relate to each other within a workforce development system depends on whether their goals are similar, partially overlapping, substantially distinct, or even in tension with one another.



- Uncover a flip chart page labeled "CUSTOMER ELIGIBILITY AND TARGETING." Ask:

What are some of the things that One-Stop partners should know about each others' eligibility requirements and targeting goals?

Why is this information relevant for One-Stop partners to know about each other?

- Record ideas on the flip chart. Ask for five or six volunteers to give ideas.

Module 2. Partnering and Organizational Change

- Display Overheads 2-54 and 2-55.

What Partners Need to Know

About Customer Eligibility and Targeting

- Examples of relevant topics:
  - What are the eligibility requirements for qualifying for services from the agency/program?
  - What additional selection criteria must be met before customers are selected to receive services?
  - What is the balance between the demand for services and the available funding or service capacity of the program? Wait lists?

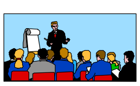
2-54

What Partners Need to Know

About Customer Eligibility and Targeting

- Why is this information relevant?
  - Understand how agency determines who is an appropriate or high priority customer.
  - Identify shared customers.
  - Identify distinctions between customer target groups.

2-55

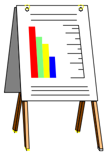


- Compare the ideas on the flip chart to the “examples of relevant topics” and ideas about why this information is relevant listed on the overheads.

How well do these ideas match the ideas you just came up with?

In a One-Stop system, expect variation in the customer eligibility and targeting policies across partner agencies and programs. Programs may have congruent targeting goals, partially overlapping goals, substantially distinct goals, or target customers at opposite ends of the potential pool. These

differences will influence how partners work together.



- Uncover a flip chart page labeled "SERVICES AND PRODUCTS." Ask:

What are some of the things that One-Stop partners should know about each others' services and products?

Why is this information relevant for One-Stop partners to know about each other?

- Record ideas on the flip chart. Ask for five or six volunteers to give ideas.

- Put on Overheads 2-56 and 2-57.

What Partners Need to Know

About Services and Products

- Examples of relevant topics:
  - What different services does the program offer?
  - What are the different levels of service that customers may qualify for? How are customers assigned to specific services?
  - What is the content, intensity, duration of specific services?
  - What are the qualifications of staff providing different services?

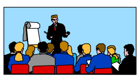
2-56

What Partners Need to Know

About Services and Products

- Why is this information relevant?
  - Understand what services different partners provide and how comprehensive their service menus are.
  - Understand how partners differ in the types of services they offer and in the content, intensity, and duration of specific services.
  - Identify service categories for which partners appear to offer similar, overlapping, or related services.

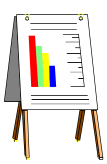
2-57



- Compare the ideas on the flip chart to the "examples of relevant topics" and ideas about why this information is relevant listed on the overheads.

How well do these ideas match the ideas you just came up with?

Across partners, services and products may be similar, overlapping, or very different. These similarities and differences will influence how the partners work together in a workforce development system.



- Uncover a flip chart page labeled "WAYS OF DOING BUSINESS." Ask:

What are some of the things that One-Stop partners should know about each others' organization, management, and staffing procedures?

Why is this information relevant for One-Stop partners to know about each other?

- Record ideas on the flip chart. Ask for five or six volunteers to give ideas.

- Put on Overheads 2-58 and 2-59.

What Partners Need to Know

About How an Agency Does Business

- Examples of relevant topics:
  - What are funding sources and funding levels?
  - At what level (e.g., federal, state, local) are different program policy decisions made?
  - What are the geographic service areas and regional/local service delivery sites?
  - What are the service delivery staff positions and job descriptions? How are staff trained and supervised?

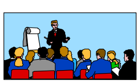
2-58

What Partners Need to Know

About How an Agency Does Business

- Why is this information relevant?
  - Business practices influence how well services meet customer needs.
  - Business practices also define agency “cultures” and shape staff comfort levels.
  - Resolving differences in how agencies do business is perhaps the most difficult challenge to address.

2-59



- Compare the ideas on the flip chart to the “examples of relevant topics” and ideas about why this information is relevant listed on the overheads.

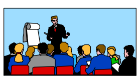
How well do these ideas match the ideas you just came up with?

- Put on Overhead 2-60.

Case Study Examples: How Local Partnerships Share Information

- Example #1. Renton Career Development Center in King County, Washington has developed a "CDC Passport" as an activity to help all staff obtain detailed knowledge about key areas of the center and partners' programs.

2-60



One way to get ideas about how to improve information sharing across One-Stop partners is to look at how other local areas have handled this challenge. We have three case study examples to share with you.

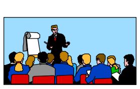
- Review the example described on the overhead.

- Put on Overhead 2-61.

Case Study Examples
How Local Partnerships Share Information
Continued

- Example #2. Brevard County, Florida is developing an "Ambassador Program" to encourage job-shadowing across staff from different programs.
- Example #3. The Baltimore One-Stop Network designated one local staff member from each program as a key contact for information about how that program worked.

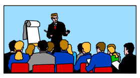
2-61



- Review the two examples described on the overhead.

We have collected some information describing the practices used in these sites to help partners become familiar with each

other. These case study descriptive materials are in the back of your binder section for Module 2. Case study materials are on light green paper.



- (Note: This would be a good point in the session to stop for a break.)

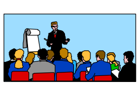
- Explain that the next activity is to break into small groups to practice identifying things you want to know about other agencies and getting answers to your questions. The resource people for each program will be managers from those agencies.

- Put on Overhead 2-62.

Group Activity: Research Partners' Programs

- Choose a program to research other than one you work for now or have worked for in the past.
- Develop a list of topics you want to research about that program. Use Activity Worksheet 2-B to list questions and record answers.
- Work with other researchers to organize and prioritize your questions.

2-62



- Review the points on the overhead.

- State that each group will have 10 minutes to brainstorm questions, and 5 minutes to prioritize and order its questions before interviewing the appropriate program "resource person."

Activity Worksheet 2-B is available for you to use to record your questions and document the answers.

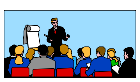
Module 2. Partnering and Organizational Change

- Put on Overhead 2-63.

Group Activity
Research Partners' Programs
Continued

- Interview the designated program manager or expert respondent about the program.
- Ask follow-up questions to make sure you understand the aspect of the program that you were asking about.
- Report back what you learned about the program and why you think this information is relevant to other One-Stop partners.

2-63



- Continue describing the small group activity by covering the points on the overhead.

- State that each group will have 15 minutes to ask their highest priority questions and record the answers.

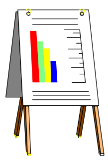
Be sure and ask follow-up questions or probes if you have not gotten the information you wanted or are not sure you understand the answer. Ask about the availability of written documents that might provide more detail on the topic.

If you are a resource person, do not "fake it" if you don't know the answer to a question. Record the question and promise to research the answer.

- Have each attendee go and stand by the name of a program they want to research. Ask individuals to redistribute themselves if some groups need more researchers. (Each group should have at least four researchers.)

- Set the timer. Let groups know when 10 minutes, 5 minutes and 15 minutes are up and tell them what activity they should be starting.

- Ask the groups to reconvene at the end of one-half hour.



- Ask participants to comment on the process of identifying and asking questions.

What aspects of this exercise were easy to do and what aspects were hard?

Why were they hard?

Did you learn anything about how to conduct an effective informational interview?

- Note responses on the flip chart.

- Put on Overhead 2-64.

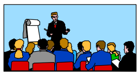
Review Similarities and Differences

Using the information obtained by researching partners' programs, review the similarities and differences between and among partners':

- Goals and objectives.
- Customer eligibility and targeting
- Services and products.
- Ways of doing business.

Use Activity Worksheet 2-C.

2-64



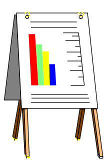
Now that we have commented on the process of obtaining information about another partner's program, let's review what you have learned about the similarities and differences between two programs.

- Explain that when groups do this exercise back home with their local partners, they will come up with findings that are a true picture of how local partners are similar and different.

- In the train-the-trainer setting, it may not have been possible for attendees to cluster by "real" local One-Stop partnerships.

If you did not do this exercise with the key members of your local team, you will need to repeat this exercise when you get home to improve the accuracy of the findings.

Which two programs would you like to compare and contrast as a group during this session?



- Ask the recorder for each of the research groups to summarize key findings about the program they researched. Allow five minutes per report.

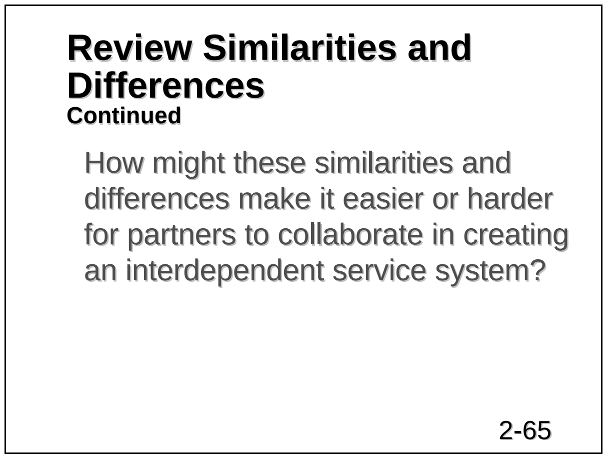
- Note key features of each program on a flip chart.

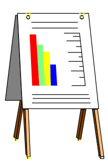
- Draw a large pie chart with three wedges on the flip chart. Put the names of the selected programs at the top. Label one wedge: SIMILAR; one wedge: OVERLAPPING BUT DIFFERENT; and one wedge: CONTRASTING.

- Ask members of the audience to identify how the two programs compare on features related to *client eligibility and targeting* and *ways of doing business* by providing examples of program features that fit in each wedge.

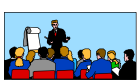
- Note the features in the appropriate wedge on the pie chart.

- Put on Overhead 2-65.





- Ask attendees to suggest how the identified similarities and differences for the two programs might affect their efforts to coordinate or collaborate in creating a client-focused workforce development service system.



- Note: this would be another appropriate time to take a break.

We are about to transition to the next topic, which is to explore how to go about developing a "common language" to describe the services and service-related concepts used by each partner agency.

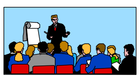
We will then practice how to use a common set of terms to "map" the services currently provided by One-Stop partners..

- Put on Overhead 2-66.

Compile and Compare Information About Local Services

- It is inevitable that different programs or agencies call different things by the same name and/or use different names for similar things.
- To prepare to build an interdependent system, partners must:
  - Develop a common language.
  - Map available services using the common language.

2-66



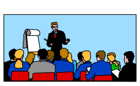
- Review the points on Overhead 2-66

- Put on Overhead 2-67.

Steps in Compiling and Comparing Information about Partner Services

- Step 1. Prepare a glossary of service terms for each program/partner.
- Step 2. Prepare a “cross-walk” of terms to translate between and among programs.
- Step 3. Agree on a shared service terminology.
- Step 4. Map partner services using shared terminology.

2-67



There are four different steps in compiling and comparing information about the services provided by each One-Stop partner.

Resist the temptation to skip a step. You will end up with a compilation of information, but you won't know if the information reflects a consistent understanding of what service

terms mean.

- Display Overheads 2-68 and 2-69.

Compile and Compare Service Information

Step 1. Develop A Service Glossary for Each Program

Include the following:

- Service elements or components, with a description of each service.
- How units of service are defined.
- Processes associated with entering and leaving services/program (e.g., intake, enrollment/registration, completion, termination).

2-68

Compile and Compare Service Information

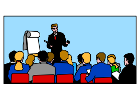
Step 1. Develop A Service Glossary for Each Program

Include (continued):

- Outcomes measured for customers using/completing a service or completing/leaving the program.

Use Activity Worksheet 2-D.

2-69

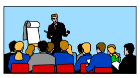


- Explain that we are now going to do an exercise that will begin to define the service terms used by each agency and program.

There are four different types of service-related terms: (1) names of service components or service categories; (2) names of units of service; (3) names of processes associated with entering or leaving a program or service; and (4) names of outcome categories used to measure customer achievements during, at the

end of, or after leaving services.

- A note to trainers: If members of a local One-Stop partnership have already completed this activity and have brought full documentation of the results, they do not need to repeat this exercise. They may want to review their findings.

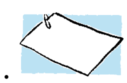


- Explain that attendees will cluster by program to complete this exercise. Ideally this exercise would be completed by individuals from the same local partnership. At the train-the-trainer session, it may be necessary to cluster several partnerships together.

- State that each group of individuals from the same or similar programs will list and define the service-related terms for their program, using Activity Worksheet 2-D to record notes.

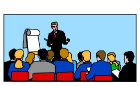
- Each group should have a recorder who will summarize the group's service terms on a flip chart sheet.

Each group will have fifteen minutes to complete this exercise.



- Set the timer for 15 minutes. Let each group know when they have five more minutes.

- Have the attendees convene into a large group again at the end of the exercise.



- Have two groups report out on their service glossaries.

- Comment on the similarities and differences in how terms are used in the two programs.

- Tell all attendees that this is a critical step to complete before they attempt to develop a map of partners' services.

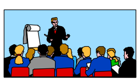
- Put on Overhead 2-70.

Step 1. Develop a Service Glossary

Case Study Example

Provide an example of a service glossary for a specific program.

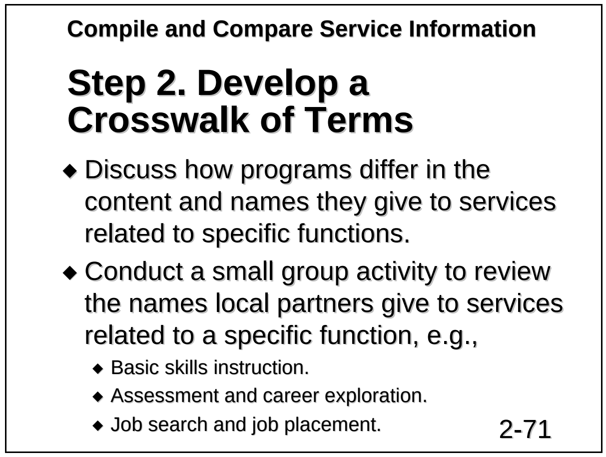
2-70

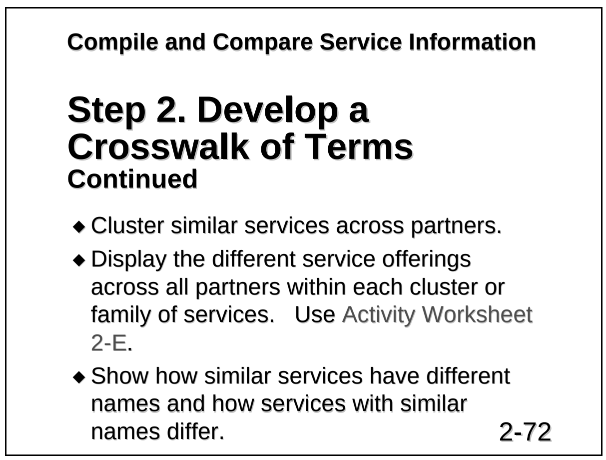


One way to get ideas about how to prepare service glossaries is to look at how other local areas have handled this challenge. We have copied an example of a service glossary developed by a local program to share with you.

This case study descriptive material is in the back of the binder section for Module 2. Case study materials are on light green paper.

- Display Overheads 2-71 and 2-72.

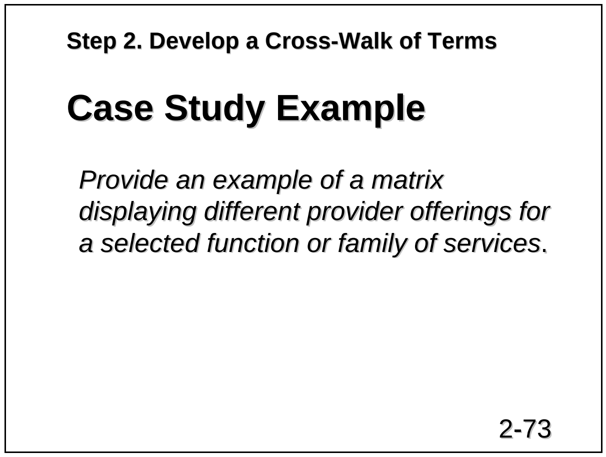




The second stage in compiling and comparing service information across One-Stop partners is to develop a crosswalk of terms.

We don't have time in this session to compile all the information across all One-Stop partner programs to develop a crosswalk of terms. This is a step that you will need to complete when your local team gets home.

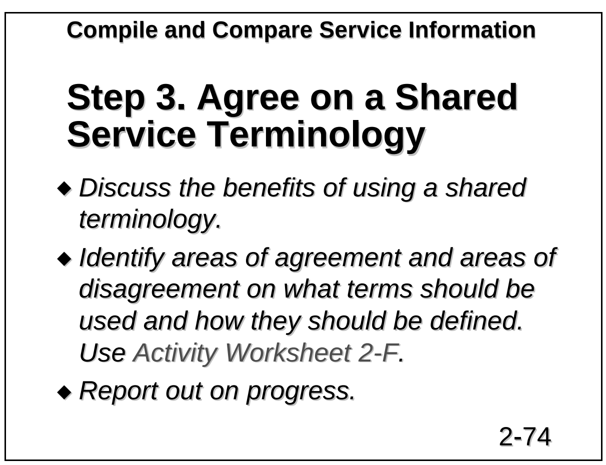
- Put on Overhead 2-73.



However, we have provided a case study example of how one local area developed a matrix that describes the service terms used by all partners and highlights their similarities and differences.

This case study descriptive material is in the back of the binder section for Module 2. Case study materials are on light green paper.

- Put on Overhead 2-74.



The third stage in compiling and comparing service information

across One-Stop partners is to agree on a shared service terminology.

This is another step that you will need to complete when your local team gets home after they have completed their glossary by program and their crosswalk of terms..

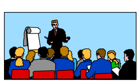
- Put on Overhead 2-75.

Step 3. Agree on a Shared Service Terminology

Case Study Example

Provide a case study example of how a local partnership developed a shared service terminology.

2-75



- State that we have provided an example of a shared service terminology that the Northwest Michigan Council of Governments developed in order to implement a common intake process for all One-Stop customers.

This case study information is located at the back of the Module 3 materials in both the trainer and participant binders.

- Put on overhead 2-76.

Managing One-Stop Centers

Definitions:

"Judicious use of means to accomplish an end" Dictionary

"Management is the art of getting other people to do all the work."
Anonymous

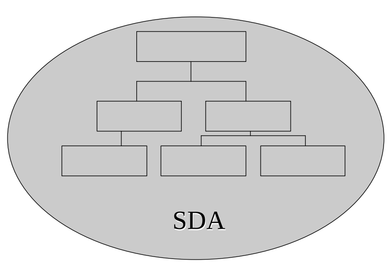
2-76

Managing integrated services is quite different from managing services scattered among many different agencies.

The term management used in this module is to be understood in the sense of a "judicious use of means to accomplish an end", rather than in its use to contrast management from labor. Management is thus something all partner agencies in a One-Stop area and all levels of partner staff are engaged in or contribute to.

- Put on overhead 2-77.

Management before One-Stop



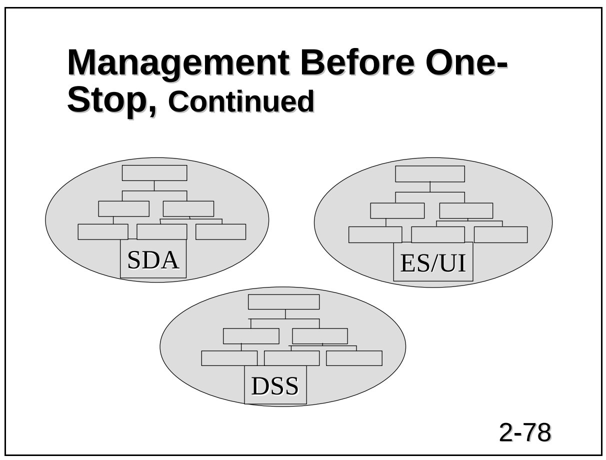
2-77

Module 2. Partnering and Organizational Change

Before we look at more detailed tools to help us manage the transition and the newly arranged services, let me now show you visually how the world has changed.

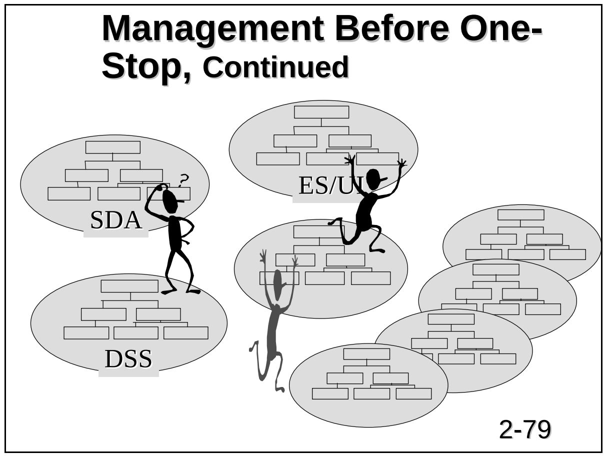
Let us consider this organization that many of you are familiar with, the Service Delivery Area (SDA). It has an organizational structure that facilitates its management. In the world before One-Stop, it was separate.

- Put on overhead 2-78.



But it was not alone. There were other organizations with similar goals and similar structures. You are seeing here as examples an organization called Department of Social Services (DSS) and one called Employment Service/ Unemployment Insurance (ES/UI).

- Put on overhead 2-79.



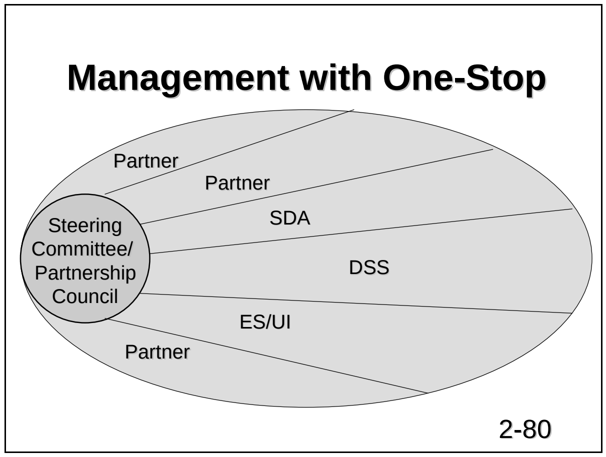
And there were many more: training providers, community colleges, adult schools, community based organizations etc.

If you were a customer in that pre-One-Stop world, your role was to figure out the roles, objectives and benefits of any number of these organizations. The burden of coordinating the services represented by all these circles was yours.

The agencies shown here did try to stay in touch with each other. They networked and occasionally coordinated with each other. Sometimes two or three of them even collaborated on a program.

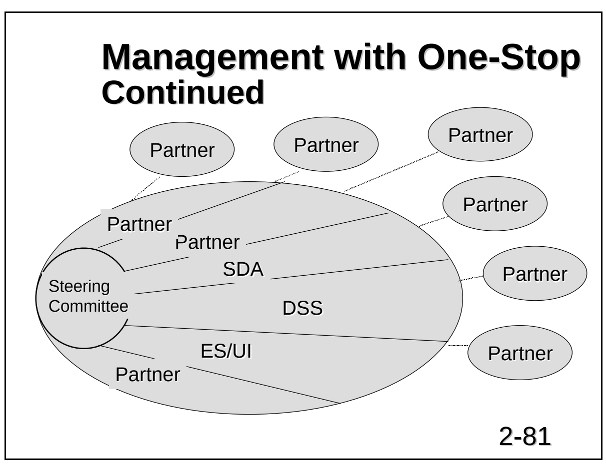
- Put on overhead 2-80.

Module 2. Partnering and Organizational Change



In the One-Stop world, demands on managing integrated services are different. This slide shows one representation of the new arrangement. Agencies that are engaged in workforce development are all tied together, working in an integrated system, managing their joint affairs through steering committee or a similar body.

- Put on overhead 2-81.



Even partners who may not co-locate in the same building are linked to the system.

- Put on overhead 2-82.

Management with One-Stop Continued

- Responsibility to coordinate services has shifted from customer to "system".
- Need to know more about partners has increased.
- Partners view each other as team members. Team management is common.
- Need for communication among partners has increased.

2-82

Managing this system creates new challenges:

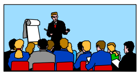
- Read slide 2-82

- Put on overhead 2-83.

One-Stop Center Management Models.

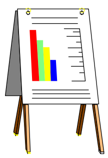
	Advantages	Disadvantages
Single Manager		
Dual Managers		
Team Management		

2-83



- Use full group discussion.

- Ask teams, which management model they have selected for their One-Stop center if a selection has already been made. Ask for opinions or examples of advantages and disadvantages of the different models.



- Write information on flip chart.

- Record advantages and disadvantages of various models on flip chart.

- Put on overhead 2-84.

We will look at different ways in which One-Stop partnerships are managing their One-Stop centers.

- Read slide 2-83 and refer to Case Study 2-A (One-Stop Center Management Models) for details on the respective sites.

- Put on overhead 2-85 through 2-89.

- Provide detail on the management models used in the case study examples. For more detailed information refer to Case Study sheet 2-A

One-Stop Center Management Models.
Louisville, Kentucky

- Health and Social Service One-Stops
- Single site administrators for each site
- Joint supervision of staff when possible
- No disciplinary authority
- Supported by
  - Operations Committee
  - Executive Committee
  - Community Council

One-Stop Center Management Models.
Bowling Green, Ohio

- Co-managed
  - Department of Human Services Co-manager
  - JTPA co-manager
- Some specialization
  - DHS manager is Center Workgroup chair.
  - JTPA manager is in charge of facility and hardware management.

Module 2. Partnering and Organizational Change

One-Stop Center Management Models. New London, Connecticut

Co-managed

- CTDOL Job Center Director
  - Overall Center Director
  - ES/UI
  - Veterans ES
- Regional Workforce Development Board Program Manager
  - JTPA Programs
  - responsible for Career Services Center

One-Stop Center Management Models. Anoka County, Minnesota

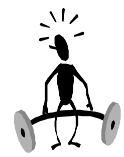
- Team-managed
  - Steering Committee co-chaired by directors of 4 investor partners (JTPA/ ES/UI/ Rehabilitation Services/ Income Maintenance)
- Supported by
  - Workforce Center Coordination and Planning Group
  - Cross Agency Operations Committee
  - Human Service Advisory Group

One-Stop Center Management Models. Des Moines, Iowa

- Team-managed
  - "Partners Group" interagency team of core partners.
- Supported by
  - Customer Services Committee
  - Assessment Committee
  - Employer Services Committee
  - Job Development Committee

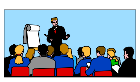
- Put on Overhead 2-90.

Activity. . .
One-Stop Center Management Models.
Which one is right for you?

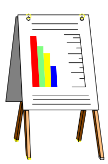


- *In your team discuss advantages and disadvantages of each management structure for your One-Stop center.*
- *Using consensus decision making technique, chose a preferred management structure.*
- *Identify next steps to prepare a recommendation to your policy body*
- *Report out.*

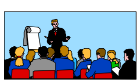
2-90



- Use full group discussion.
- Ask teams, which management model they have selected for their One-Stop center if a selection has already been made.
- If a selection has not been made, teams have an option to use the activity on slide 2-90 to select a management model.



- Write information on flip chart.

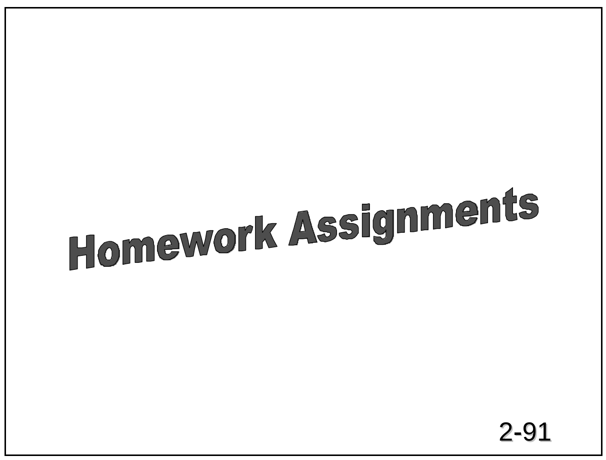


- Ask for attendee feedback about what they have learned during the training session.
- Ask about whether they plan to complete any of the exercises in this session in their local areas when they return and which ones.
- Probe whether they plan to conduct research on key features of

partners programs and share information across program partners; develop a common service terminology.; complete service mapping.)

- Describe how the products developed during Module 3 will serve as key inputs to the activities to be completed in subsequent modules, particularly Module 4.

- Put on Overhead 2-91.



- We have developed several homework assignments to guide local partnerships through the process of becoming familiar with One-Stop partners, documenting similarities and differences, and developing a common set of terms and definitions to describe the services offered by all One-Stop partners.

- Put on Overhead 2-92.

Assignment 1 (Optional)

- Prepare a written summary or chart of the key features of each of the major programs operated by the partner agencies.
- Ask a representative from each program to review and correct its profile.
- Disseminate this summary to all local service delivery staff.

2-92

- Review the overhead points one at a time.

- Put on Overhead 2-93.

Assignment 1
Continued

- Identify authoritative sources of information (individual informants and resource manuals) that can be used to answer future questions or provide additional detail on program features.

2-93

- Review the overhead points.

- Put on Overhead 2-94.

Assignment 2

- Complete a map of customer services and products offered by each of the partner programs.
- This work could be divided among several different committees, each of which will map a different cluster of customer services.

2-94

- Review the overhead points one at a time.

- Put on Overhead 2-95.

Assignment 2b (Optional)

- Research and report on variations in how different partners do business.
- Possible topics for research include:
  - How partners provide staff development.
  - Details of personnel policies, wage levels, and staff benefits.
  - Reporting and performance requirements.

2-95

- Put on Overhead 2-96.

Assignment 3

- Develop a recommendation for a One-Stop center management structure for your policy body.

2-96

- Put on Overhead 2-97.

Resource Tool Kit

2-97

The Tool Kit at the end of the Participant Workbook summarizes the process and continuous improvement tools that have been discussed in this and other sessions.

- Put on Overhead 2-98 through 2-100. Review the tools covered in this session.

Tools Used in Module 2

- Brainstorming:
  - Identifying what partners need to know about each other.
  - Generating questions relevant to identified topics.
- Interviewing:
  - Documenting key features of One-Stop partners through question and answer sessions with managers.

2-98

Tools Used in Module 2
Continued

- Identifying authoritative sources of information for reference on an as-needed basis:
  - Written documents.
  - Knowledgeable individuals.
- Using charts and matrices:
  - Documenting comparable information about partners' programs.

2-99

Tools Used in Module 2
Continued

- Developing a glossary of terms used by each program.
- Preparing a "cross-walk" that compares the service offerings and service terms used by each program.
- Consensus building: exploring willingness to use a common language.

2-100

- Thank those specifically who helped contribute to the session today.

- Thank everyone for coming.

- Wish them a safe trip home (if this is a stand-alone module), or tell them when and where they should be for the beginning of the next module (if module 2 follows).

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SPR

SOCIAL POLICY RESEARCH ASSOCIATES

Partnering for Quality under the Workforce Investment Act:
A Tool Kit for One-Stop System Building

Activity Worksheets

Module 2

200 Middlefield Road, Suite 100
Menlo Park, CA 94025
Phone (650) 617-8625/Fax (650) 617-8630

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Activity Worksheet 2-A
Profiles to Guide Customer Role Play

Customer 1

You are a 35-year old single parent with a seven-year old daughter and a ten-year old son who is receiving monthly cash assistance under the TANF program. Your case worker has explained to you that you will only be eligible for 36 months of assistance under the state's TANF program and that you will be expected to go to work as soon as possible. Your needs include:

- Learning about the world of work.
- Completing your GED.
- Arranging high quality child care.
- Finding a job.
- Getting some clothes that you can wear to work.
- Getting some parenting skills.
- Helping your children with their homework.

Customer 2

You are a 24-year old attending the local community college in your second semester. Your family cannot afford to help you with your educational costs. You are a good student. You need help:

- Finding a part-time job.
- Exploring the availability of student financial aid.
- Learning about different occupations and setting career goals.
- Arranging reliable transportation.
- Trying to find affordable health insurance.

Customer 3

You are a fifteen-year old high school student who is not doing very well in school and is thinking about dropping out. You have a problem with low self-esteem. You have heard that there are summer jobs available through the local career center. You want to learn about careers and get a summer job.

Activity Worksheet 2-A,Continued
Profiles to Guide Customer Role Play

Customer 4

You are a 26-year old stock clerk at a large home improvement store chain. You have been working at the same job for 6 years. You want information about how you can get skills that will help you prepare for moving up a career ladder.

Customer 5

You are a 48-year old machinist who has been laid off after 20 years at the same job when your company lost a big defense contract. . You have no computer skills and limited math skills. You are very depressed and don't know what to do. You are starting to deal with your frustration by drinking too much.

Customer 6

You have been working as a software designer in Silicon Valley for 12 years. You would like to find out what jobs are available in the Atlanta area, since your wife (husband) has just been transferred to her(his) company's branch office in Atlanta.

Activity Worksheet 2-B
Page to Note Questions and Answers: Things You Want to Understand About a Program Other Than Your Own

PROGRAM SELECTED TO RESEARCH:___________________________

Goals and Objectives

What do you think you already know about this program's goals and objectives? Do you want to check any of this information to make sure it is correct? Is there anything that is puzzling or annoying to you that you would like to understand the history behind?

What would you like to know more about? Why?

Activity Worksheet 2-B
Page to Note Questions and Answers, Continued

PROGRAM SELECTED TO RESEARCH:____________________________

Eligibility and Client Targeting

What do you think you already know about this program's eligibility and client targeting policies and goals? Do you want to check any of this information to make sure it is correct? Is there anything that is puzzling or annoying to you that you would like to understand the history behind?

What would you like to know more about? Why?

Activity Worksheet 2-B, Continued
Page to Note Questions and Answers

PROGRAM SELECTED TO RESEARCH:_____________________________

Products and Services

What do you think you already know about this program's products and services? Do you want to check any of this information to make sure it is correct? Is there anything that is puzzling or annoying to you that you would like to understand the history behind?

What would you like to know more about? Why?

Activity Worksheet 2-B, Continued
Page to Note Questions and Answers

PROGRAM SELECTED TO RESEARCH:______________________________

Ways of Doing Business

What do you think you already know about this program's operational procedures, including organization, management, staffing, and facilities procedures? Do you want to check any of this information to make sure it is correct? Is there anything that is puzzling or annoying to you that you would like to understand the history behind?

What would you like to know more about? Why?

Activity Worksheet 2-C
Summary of Similarities and Differences Between Partners' Programs

Goals and Objectives	
Examples of Goals that are the Same or Similar	*Examples of Goals that are Overlapping but Have Some Significant Areas of Difference*
Examples of Goals that are Very Different	

Activity Worksheet 2-C, Continued
Summary of Similarities and Differences Between Partners' Programs

Eligibility and Client Targeting	
Examples of Policies that are the Same or Similar	*Examples of Policies that are Overlapping but Have Some Significant Areas of Difference*
Examples of Policies that are Very Different	

Activity Worksheet 2-C, Continued
Summary of Similarities and Differences Between Partners' Programs

<table>
<tr><th colspan="2">Products and Services</th></tr>
<tr><td>Examples of Services that are the Same or Similar</td><td>Examples of Services that are Overlapping but Have Some Significant Areas of Difference</td></tr>
<tr><td colspan="2">Examples of Services that are Very Different</td></tr>
</table>

Activity Worksheet 2-C, Continued
Summary of Similarities and Differences Between Partners' Programs

Ways of Doing Business	
Examples of Procedures that are the Same or Similar	*Examples of Procedures that are Overlapping but Have Some Significant Areas of Difference*
Examples of Procedures that are Very Different	

Activity Worksheet 2-D
List and Definitions of Service-Related Terms

PROGRAM SELECTED: ________________________________

Service Elements or Components

Units of Service—Which service(s) does each term apply to?

Activity Worksheet 2-D, Continued
List and Definitions of Service-Related Terms

Processes Associated with Entering and Leaving Services and Programs (e.g., intake, enrollment, registration, completion, termination, followup)

Customer Outcomes

Activity Worksheet 2-F
Agree on a Shared Service Terminology

Develop a Common Set of Service Elements or Components (Schema Developed by Mary Ann Lawrence for Use in Training Workshops)

Suggested Common List of Service Elements	Your Version of a Common List of Service Elements
Application Assessment Basic Skills Testing Basic Skills Training Career Exploration Career Information Coaching and Customer Advocacy Computer Labs Customer Service Plans Customized Training Eligibility Focus Groups Individual Training Accounts Internships Job Clubs Job Fairs Job Leads Job Match Services Job Order Posting Job Search Assistance Labor Market Information Life Skills Training Literacy Training Occupational Aptitude Testing Occupational Training (Classroom) On-the-Job Training Orientation Post Placement Activities Pre-Employment Skills Training Reception/Greeting Referrals: Health and Social Services Referrals: Other Workforce Development Resource Library Summer Job Program Work Experience Other: Other:	

Partnering for Quality under the Workforce Investment Act:
A Tool Kit for One-Stop System Building

Case Studies

Module 2

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CASE STUDY EXAMPLE
MODULE 2. PARTNERING AND MANAGING CHANGE

RENTON, WASHINGTON CAREER DEVELOPMENT CENTER'S PASSPORT PROGRAM

Background

The Career Development Center (CDC) in Renton, Washington has six partner agencies, and over 50 staff working together in a 20,000 square foot facility. Over 3,000 customers are served monthly. The partners at the Career Development Center include:

- Seattle-King County Private Industry Council
- Washington State Employment Security Department
- Renton Technical College (Adult Learning Center)
- King County Work Training Program (Youth Learning Center)
- IAM CARES (serves persons with disabilities)
- P.A.C.E. (Pacific Associates, Asian Counseling and Referral Service, Central Area Motivation Program, and Seamar)

The CDC has a non-hierarchical team-based management structure that uses functional leadership. Most of the partner agencies at the CDC do not have management staff on site, but participate on the management team that meets regularly. Day to day operational issues are addressed through the Operations Committee, which includes line staff from each partner agency. They bring their recommendations to the management team for approval.

The CDC Passport

With the growth of the center, and the variety of agencies and services offered at the CDC, cross training became a priority. To help new staff at every level learn the services, principles, programs, partnerships, and technology in operation at the center, the *CDC Passport* was designed.

The *CDC Passport* is a staff training design that follows a theme of travel, with *Destinations* and *Points of Interest*. All CDC staff are encouraged to complete the "trip" to become familiar with all aspects of the center. At each destination, staff may view videos, attend customer workshops, receive handouts, and interview other CDC staff members.

Trip destinations include:

- **CDC Team**. At this destination, staff learn about the different personnel at the center, view a video describing the roles of all on-site staff, and learn how to locate a partner agency or staff person.
- **One-Stop Operations.** At this destination, staff receive a handout with information about One-Stop principles and design, listen to a presentation that explains the "inverted pyramid" model of service delivery, view a video on CDC layout and services available to customers, and meet with a member of the CDC staff to learn about the One-Stop implementation process.
- **Technology.** At this destination, staff attend a workshop that demonstrations the computer applications available at their workstations, and go on a tour of the computer applications lab to learn about the software, tutorials, and classes available to customers. Staff receive hands-on training to teach them how to orient customers to the computer lab.
- **Facility.** At this destination, staff tour key areas within the center, attend a workshop to learn how to conduct their own tours of the center, and interview CDC staff about their marketing resources.
- **Service Delivery.** At this destination, staff sit in on a one-hour customer orientation to the center and the services available at the center. Staff "touring" this destination also sit in on a three-hour workshop designed to help customers as career planning and job search skills and select additional services. Disability awareness training is also provided at this tour destination.

As each individual staff member concludes his/her journey at each destination, a "Customs Officer" signs the Passport. When the passport has been completed, the team member receives a certificate to post at his/her workstation, an announcement is made to congratulate him/her, and other fun activities occur to celebrate his/her success.

Started in June 1997, the program was evaluated in November 1998. As a result of the evaluation, additional modules are being added in areas such as "Partner Etiquette" and "An Introduction to the Two Other CDC's in King County, Washington."

The CDC Passport is a project of the Seattle-King County Private Industry Council and Washington State Employment Security Department and was made possible in part by a Local Learning Lab grant from the U.S. Department of Labor.

For more information, contact Maureen O'Dea Haynes, Career Development Center, 919 SW Grady Way, Suite 125, Renton, Washington 98055-2942. Phone: (425)-271-0488.

(Case Study Completed January 1999)

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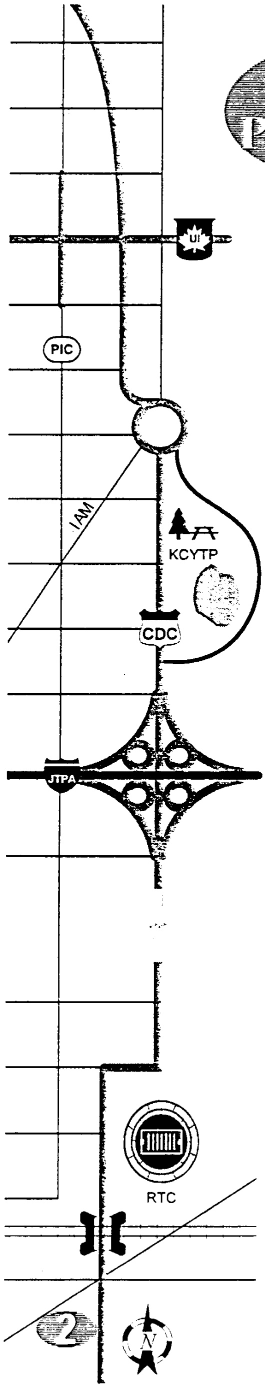

CDC PASSPORT TRIP PLANNER

Destination	Points of Interest	Mode of Transportation	Directions and Tour Guides
CDC Staff	***Staff Roles:*** In this video, each CDC agency describes responsibilities of each of the positions held by their on-site staff. This information assists staff to better understand job duties and facilitates working together as a team. ***Your CDC Team:*** Handouts consist of *biographies* of current staff, an *organizational chart* for the center, and a *map* with the location and phone extension of each staff. This information helps staff get to know each other, understand the organizational structure of the center and locate a partner agency or staff person.		
One-Stop Operations	***One-Stop Principles:*** Handouts consist of definitions and examples of the four DOL *One-Stop Principles*, the *CDC Operating Principles* and *Constitution* developed by staff. This information ensures that staff are aware of the principles that guide our service design and delivery, the behaviors that we value, and our goals for the future. ***CDC Development and Service Delivery:*** This presentation chronicles the *history of the CDC* and explains the *Inverted Pyramid Model of Service Delivery* used at the center. By learning how our One-Stop system developed and continues to evolve, staff gain an understanding of "why we do things the way we do" ***Partnerships:*** This brief video tape interviews the four founding partners at the CDC and includes information on *One-Stop Systems*, *CDC layout* and *services* available to customers. It helps deliver the message that partnerships and customer service are key ingredients in a One-Stop system. ***Local Learning Lab Grant:*** Staff meet with a member of the Learning Lab Team and receive information about the *purpose, characteristics,* and *activities* of the grant. In this overview staff learn how to record activities and respond to requests for tours, products, and technical assistance.		
Technology	***Desktop Technology Demo:*** In this workshop, staff are shown how to use the computer applications that are available at their workstations to ensure the maximum use of tools and technology available at the CDC. ***Computer Applications Lab:*** In this tour, staff receive information about the use of the lab including descriptions of all of the *software*, *tutorials*, and *classes* available to customers. The tour provides *hands-on training* so that staff will be comfortable assisting customers with a basic introduction to the area.		

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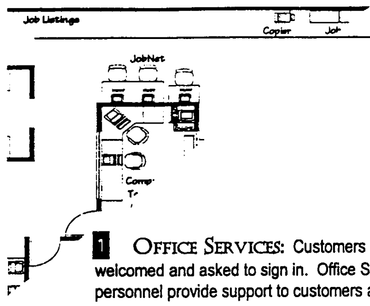

TOUR GUIDE

1 OFFICE SERVICES: Customers are welcomed and asked to sign in. Office Services personnel provide support to customers and staff.

2 RECEPTION AREA: While customers wait for appointments or to see staff, they are drawn to the Resource Library. Signs with a stop watch on them read, "If you have waited more than 10-minutes for your appointment, please alert the front desk."

3 RESOURCE LIBRARY: All services in this area are open to the public from 8 a.m. to 5 p.m. Services include a job board and job orders, various labor market information and job search books, school information, local newspapers and periodicals.

Other Self-Service items here include computers which enable JobNet, Internet, word processing, and multi-media computer skill tutorials. TV/VCRs are available for watching job search tapes, and customers can use free photocopier, phones and fax for job-related business.

4 CHILDREN'S PLAY AREA: This area is set up for customers with children. While meeting in one of the four interview rooms, the parents can see their children play through the windows.

5 TRAINING ROOM A: Large space for classes, workshops and meetings.

6 TRAINING ROOM B: Large space for Orientations, classes, workshops and meetings.

7 TRAINING ROOM C: Smaller space for classes, workshops and meetings.

8 TRAINING ROOM D: Now used as a lunch room and lounge area for the learning centers.

9 YOUTH LEARNING CENTER: This is a joint venture between the KING COUNTY WORK TRAINING PROGRAM and the PRIVATE INDUSTRY COUNCIL. The Youth Learning Center provides a broad spectrum of basic skills to economically disadvantaged and unemployed youth.

10 ADULT LEARNING CENTER: A partnership between the RENTON TECHNICAL COLLEGE and the SEATTLE-KING COUNTY PRIVATE INDUSTRY COUNCIL. The Adult Learning Center provides competency-based instruction in math, reading writing and English language skills. The classroom between the centers is used by both programs.

11 TOILETS.

12 KITCHEN AND BREAK ROOM.

13 STAFF WORK AREA: This area houses cubicles and offices for 31 staffers from PIC-WORKFORCE, Employment Security, IAM CARES and P.A.C.E.

CDC PASSPORT

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CASE STUDY EXAMPLE
MODULE 2. PARTNERING AND MANAGING CHANGE

BREVARD COUNTY, FLORIDA'S AMBASSADOR TRAINING

Background

Brevard County, on the east central Florida coast, is the home of Cape Canaveral and the Kennedy Space Center. The county stretches 72 miles from north to south, and has a population of 450,000. The Brevard Job Link One-Stop Career Center System was established in August 1994, with the opening of its first "job Link" center. Today, Brevard's Workforce Development Board oversees a system that includes five "full-service" one-stops, 20 "satellite" sites (located in public housing areas as well as high schools and adult education centers countywide), and a popular web site. Over 10,000 customers are served monthly.

During the spring of 1997, the Brevard One-Stop system partners held several visioning sessions to identify system strengths and enhancement needs. One of the "gaps" identified was inter-agency training. To fill this gap, the "Ambassador Training Program" was created.

Ambassador Training

The goal of the project was to enhance customer service by developing staff to be certified "ambassadors" of the One-Stop system. The first step in the process was to assess the needs of staff to determine what training would be needed first. The Priority Worksheet for One-Stop Skills Chart developed by Mary Ann Lawrence (see Exhibit 2-3) was distributed to front-line staff and management. The returned surveys were analyzed as a group, as well as by job title and agency. The results were presented to an interagency project team, and a curriculum outline was drafted (Exhibit 2-4). An intern from the local university was employed to write the curriculum, under the direction of subject matter experts from partner agencies.

Training areas that were targeted for immediate implementation were Computer/Technology Skills and Career Development. A variety of modes of training are used, including classroom instruction and computer-based tutorials. The curriculum for Business, Job Seeker and Labor Market Services is under development.

(Case Study Completed January 1999)

AMBASSADOR TRAINING OUTLINE

1. Core Knowledge
a) Brevard Job Link Orientation
b) Customer Service
c) Business Writing
d) Team Building
e) Time Management
f) Stress Management
g) Listening Skills
h) Cultural/Ethical Issues

2. Career Development
a) Career Assessment
b) Counseling Skills
  i) Understanding the Needs of Special Populations

3. Job Seeker Services
a) Job Search Preparation/Self-Service Options
  i) Resume/Cover letter assistance
  ii) Interview preparation
  iii) Job Referral Service/ODD System
  iv) Internet application
b) Sponsored Training/Employment Programs
  i) Job Training Partnership Act (JTPA)
  ii) Work and Gain Economic Self-Sufficiency (WAGES)
  iii) Temporary Assistance for Needy Families (TANF)
  iv) Vocational Rehabilitation
  v) Unemployment Insurance
  vi) Veteran's Employment
c) Community Support Services
  i) Child Care Services
  ii) Transportation
  iii) Mental Health Services
  iv) Help-lines

4. *Business Services*

a) Business Incentives
   i) Employer assessment
   ii) Worker Opportunity Tax Credit
   iii) Wage reimbursement
   iv) On-the-job training
b) Labor Law Information
c) Employer Customer Service
   i) Employee referral
   ii) Job matching
d) Job Developer Techniques

5. *Labor Market Services*

a) Labor Market Information
b) Economic Development

6. *Computer/Technology Skills*

a) Basic Office Computer Skills
   i) Windows
   ii) Excel
   iii) Word
   iv) Outlook
b) Computer based Career Development Tools
   i) CHOICES
   ii) ODDS System
   iii) Career Scope
   iv) Job Link Organizer
c) Computer-based Case Manager Tools
   i) INFACT
   ii) WIS
   iii) Micro OIS
d) Internet Skills
   i) Brevard Job Link Web Site
e) Video Conferencing
   i) Introduction to PictureTel

PRIORITY WORKSHEET FOR ONE-STOP SKILLS CHART
developed by Mary Ann Lawrence 317-329-8418
DRAFT INFORMATION

	Skill/Knowledge Statement	***At Hire or OJT***	***Very Impor-tant***	***Very Freq.***	***Freq.***	***Infreq.***
Career Specialist						
A1	Use computer assisted career guidance					
A2	Access employment and job search info on the internet					
A3	Administer assessments to establish career and education needs					
A4	Interpet assessment data to establish career and education needs					
A5	Know a variety of employment assessment tools and the appropriate uses					
A6	Use labor market information					
A7	Facilitate career planning					
A8	Analyze historical placement data					
A9	Provide career guidance					
A10	Identify appropriate assessment needed					
A11	Assess skills and abilities					
A12	Assess aptitudes and interests					
A13	Assess values and personalities					
Center Administration and Fiscal						
B1	Provide on-site security (physical and property)					
B2	Intervene in crisis situations					
B3	Develop and maintain filing systems					
B4	Manage room scheduling					
B5	Build partnerships					
B6	Collaborate with partners					
B7	Develop interagency cooperative agreements					
B8	Organize advisory committee					
B9	Facilitate advisory committee					
B10	Conduct planning					
B11	Design data gathering and tracking systems					
B12	Develop contract management system					
B13	Develop contracts					
B14	Negotiate contracts					
B15	Manage contracts					
B16	Amend contracts					
B17	Provide property and equipment maintenance					
B18	Dispose of unnecessary property and					

CASE STUDY EXAMPLES

MODULE 2. PARTNERING AND MANAGING CHANGE

ONE-STOP CENTER MANAGEMENT MODELS

SINGLE MANAGER

A) Louisville, Kentucky

Social Services and Health Services One-Stops. Louisville's Neighborhood Places are a well tested One-Stop system for the delivery of social and health services that preceded DOL One-Stops. All mandated services in the center are run by state agencies. Oversight over the centers is in the hands of the County Human Services Department that had hired administrators for each site. Site administrators are in charge of day-to-day operations of the centers. Supervision of partner agency staff is done jointly whenever possible. Since Neighborhood Place administrators do not have disciplinary authority over most staff at the centers, their supervision is dependent on inspired leadership and discussions with staff on resolving customer issues. Some supervision is off site. Each Neighborhood place also has an operations committee that handles day-to-day issues, an executive committee and a managing board for oversight. A community council, composed of participants/ recipients and residents of that neighborhood is in place to ensure that the services provided meet the needs of the community.

B) Creston, Iowa

The Creston Center is managed by the JTPA director who is responsible for overall management of the shared physical facility and day-to-day center operations. The director also serves as the primary liaison between the various state agencies, departments, and programs represented at the center. The center director coordinates closely with the Employment Service office manager in administering the center's day-to-day functions.

C) Lake Jackson, Texas

Single manager supported by a team of program managers. In Lake Jackson, Texas, the center formed a management team that included a single center manager as well as supervisors for the UI, ES, JTPA, JOBS, and VETS programs – all of whom were employed by the same state agency. This management committee was jointly responsible for day-to-day administration, staffing, and scheduling decisions.

Management committee meetings also provided opportunities to coordinate center activities, share information on service provision, and establish long-range planning goals for the center.

DUAL MANAGERS

A) Wood County Employment Resource Center, Bowling Green, Ohio

Co-managers provided by the Wood County Department of Human Services (DHS) and the Toledo Area PIC are responsible for day-to-day management and operations of the Wood County Employment Resource Center (ERC). The co-managers work as a team; both individuals said that they “do what is necessary to keep the Center operating.” The DHS co-manager is chair of the Wood County Center Workgroup (which includes all Wood County agency partners). The JTPA co-manager is in charge of the financial aspects of operating the center and coordinating its software and hardware needs.

Shared day-to-day responsibilities of the Center co-managers include overseeing the scheduling and operation of the Center, assisting in resolving conflicts among partners, and carrying out the action plans approved by the Governance Council. In addition to their One-Stop management responsibilities, the center co-managers are also responsible to their respective agency for program-related duties. Staff from each agency assigned to them conduct more detailed eligibility determinations for their respective programs and assist in referring customers to services offered at the center as well as by their respective agencies.

While co-managers are responsible for implementing and overseeing the One-Stop training, capacity building, monitoring, and evaluation procedures, all local agency partners are expected to share responsibility for meeting local One-Stop goals as well as furthering Ohio’s state goals. At each of the One-Stops in the local system, OBES ES and UI representatives have been cross-trained, renamed Customer Service Representatives, and have taken on the functions of assisting customers with both ES and UI services. All mandatory agency partners provide on-site service staff at least one-half day each week and offer off-site staffing assistance to Center customers as needed, through referrals to the partner agencies’ “home sites.” Non-mandatory agency partners also assign staff to visit the Center on a periodic basis, but the frequency of visits may be less than once weekly.

B) New London, Connecticut

In New London, Connecticut, the local Job Center director of the Connecticut Department of Labor (CTDOL) has been designated the One-Stop Center Director. However, many day-to-day operating decisions are made jointly with the program manager of the Regional Workforce Development Board. There still is a clear division of management responsibility for Center operations by categorical programs and funding streams. The CTDOL Job Center director oversees all CTDOL-administered programs including Employment Services, Unemployment Insurance, and Veterans Employment Services. The RWDB program manager is responsible for administering JTPA Title II and Title III grants as well as Federal discretionary grants for dislocated workers.

As part of the integrated services approach of the New London Career Center, several functions are shared by the two agencies. For example, CTDOL and the RWDB jointly operate and staff a Career Services Center and a Resource Library. According to a detailed memorandum of understanding developed by the two partners, the RWDB program manager is responsible for the day-to-day management of the Career Services Center, including establishing staff schedules and supervising the CTDOL staff assigned to work in the Career Services Center.

A Local Management Committee has been established as a standing committee of the Southeast Connecticut Regional Workforce Development Board (RWDB) to oversee the operation of the two *Connecticut Works* Centers planned for this region. As required by the state, key members of the Local Management Committee include the local CTDOL Job Center (ES/UI) director for each Center and the executive director of the Regional Workforce Development Board. At present, there are eight members of the Southeast Connecticut Local Management Committee, all of whom have voting privileges. The members of the Committee include:

- The New London Job Center director
- The Norwich Job Center director
- The executive director of Southeast Connecticut Regional Workforce Development Board
- The president of the Southeast Connecticut Chamber of Commerce

- The executive director of the Corporation for Regional Economic Development
- The regional director of the Department of Social Services
- The executive director of the Opportunity Industrialization Center
- The president (usually represented by the dean of continuing education) of the Three Rivers Community-Technical College

The Local Management Committee, chaired by the executive director of the Corporation for Regional Economic Development, operates primarily as an advisory body and has responsibility for reviewing and ratifying Center plans.

TEAM MANAGEMENT

A) Anoka County, Minnesota

In Anoka County, day-to-day management of the Workforce Center is provided by a Steering Committee that oversees Center operations. The Steering Committee is co-chaired by the directors of four agencies within the Center (JTPA, ES/UI, Rehabilitation Services, and Income Maintenance). Meetings of the Steering Committee, which are held every three weeks, are attended by about twenty supervisory staff and directors from all agency partners at the Center including representatives from Child Care Assistance and the State Services for the Blind. The Steering Committee makes recommendations to the Workforce Council on issues of service improvement, provides input to the preparation of Workforce Center budgets and service coordination plans, oversees customer satisfaction and outcome measurement, and maintains ongoing communication with front-line staff on a variety of policy, funding, and operational issues.

The *Workforce Center Coordination and Planning Group* meets on a quarterly basis. The group, which is co-chaired by the directors of Job Training Center, Job Service, the Division of Rehabilitation Services, and Income Maintenance Services, provides a forum for planning, implementing, and managing a coordinated system of employment and training. The Coordination and Planning Group meetings are described as relatively informal, and they provide an opportunity for partners to discuss a range of policy matters. In addition to the five core Workforce Center partners (Job Training Center, Job Service, and Division of Rehabilitation Services, Anoka County Income Maintenance, and State Services for the Blind), other partners in the Coordination and Planning Group include Anoka-Ramsey Community College, Anoka-Hennepin Technical College, Rise Incorporated, Metro North Learning Lab, the

Family Resource Center, and the Anoka County Community Action Program. This shared leadership structure of the Workforce Center has increased the ability of local service providers to combine program strategies and offer innovative service programs.

Cross-agency "operations committees," comprised of front-line and supervisorial staff from the participating Center partners, provide the opportunity for agency staff to discuss and provide input and feedback to the Steering Committee on common service functions (intake, assessment and career planning, job search, training, case management, and employer services, services for the general public) as well as Center-wide operations and management issues (staff training, budgeting and accounting). Another committee, the "customer advisory group," solicits input from focus groups of staff and customers and makes reports on customer feedback to the Steering Committee.

The *Human Service Advisory Group*, composed of all Workforce Center partners and other agencies that are co-located at the Human Service Center, has held regular monthly meetings since the Center began operations in 1991. These meetings provide a forum for Workforce Center partners to coordinate workforce development efforts with the range of social and educational service providers represented at the Human Service Center.

Although there are many opportunities for direct service staff at the Center to participate on these various interagency advisory and operations committees, the different agencies that comprise the Workforce Center still have their own data systems and telephone lines. State and County employees, for example, are on different telephone networks. To facilitate day-to-day communication across staff employed by different agencies, the Center partners are exploring the feasibility of a common telephone system for all Workforce Center staff.

B) Des Moines, Iowa

The One-Stop center in Des Moines, Iowa, is managed by an interagency team that guides use of the shared facility and the consolidation of core One-Stop services. Center management is shared by senior staff from all eight core partners at the center. A "*Partners' Group*," including senior staff from all local agencies that operate one or more major public workforce development program, is responsible for joint administration of the Center. The Partners' Group meets every other week to address issues of common concern and plan for the integration of selected core services. All workforce development agencies participating in the Partner's Group are committed to an integrated local planning process. "Core partners" are moving rapidly beyond coordinated planning to the development of integrated service functions. Partners that are not yet ready to participate in integrated service functions (because of philosophical, practical, or legislative/regulatory barriers) are welcome to participate as "non-core partners" in common planning and coordination efforts.

Communication and Coordination. Current mechanisms for local communication and coordination to support One-Stop development include bi-weekly Partners' Group meetings in which agency administrators participate, as well as meetings of four planning committees composed of agency administrators and some line staff. The key inter-agency planning committees include: Customer Service, Assessment, Employer Services, and Job Development. Each of these committees are developing proposals for the integration of selected services across the participating agencies for consideration by the full Partners' Group.

C) Arlington, Texas

Beginning in the summer of 1994, a 22-member Job Training Interim Committee, representing a broad range of workforce development and social service agencies, began meeting on a regular basis. The purpose of these meetings was to explore options for facilitating co-location among partner agencies, sharing key information about agency programs and plans, and developing integrated services. Supported by key staff from the Arlington Human Service Planner's office, the local JTPA administrative entity, and the local Texas Employment Commission office, the planning process culminated in the establishment of the Arlington Job Training Center at its present location in November 1994.

After the Arlington Job Training Center was established as a One-Stop Career Center, management functions were assumed by a "Site-Based Management Committee," which is currently chaired by the Arlington Center site manager. This committee, comprised of 24 committee members and fifteen ex-officio members, includes broad representation from on-site service providers, and other agencies participating in local One-Stop planning and policy development. It includes a number of individuals who were involved in the initial development of the local One-Stop career center concept.

Communication and Coordination. Several formal mechanisms for communication are in place to facilitate communication between and among local One-Stop partners. Some of these are specifically focused on the Arlington Career Center, while others are broader in scope and encompass county-wide efforts in social services and workforce development. Center based communication and coordination mechanisms are described below.

- *The development of a wide-area network with the capacity to support electronic communication* (e.g., e-mail) within the Arlington Center and between Center staff and partner agencies and other network sites, is a high priority and is being addressed as part of the development of the technology infrastructure for local One-Stop operations.
- *The Arlington Site-Based Management Committee* meets on a regular basis to coordinate Center activities, share information on service provision, and establish long-range planning goals for the Center. In addition to full committee meetings, there are also two active sub-committees on *employer services* and *customer satisfaction*.
- *Center-Based Work Groups,* which are teams of front-line staff, meet regularly to discuss current service practices across partner agencies and opportunities for improved coordination or integration of services. These include groups on *customer service*, *assessment*, *information services, and employer services*. Two other groups, *scholarship management* and *academic services,* provide information on educational opportunities related to career development. Work groups provide regular updates on their activities at staff meetings.

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